

Preface to the Reports to the 81st General Convention of The Episcopal Church

After the initial flurry of post-convention activity, the close of a General Convention provides a period of relative calm. It is often a time for evaluation, fine-tuning of plans for the upcoming triennium, organizing interim work, and outlining future projects. Not surprisingly, that was not the case with 2022; while apparent “calm” may have been observed, it was the serenity of a swan in a seemingly effortless glide – while its limbs are in constant motion beneath the surface of the water. In fact, so temporally constrained and so concentrated was the work between the 80th and 81st conventions that we never settled on a name: was it the *Biennium*? Was it a truncated *Triennium*? Or was it best described as a *Mini-ennium*, containing all the requisites of three years but fulfilled in under two?

Whatever it is called, the interim between these conventions has been more of a sprint than a marathon, with much accomplished in that most finite of all treasures: time. As you read and study these *Reports*, I hope you will say a prayer of thanksgiving for the faithful Episcopalians who labored under enormous pressure and have done so by keeping their attention on God’s mission in their common work. Thank you all!

I have announced my retirement as the Secretary of the General Convention and Executive Officer for later this year. Later in these *Reports*, you will find a narrative of some of what has been accomplished since 2013. As I complete over eleven years in this ministry, I am filled with gratitude for the friends and colleagues who have supported me in my work, and who shared a vision that sensible governance, ably administered, is foundational to the mission of the church. It has been a pleasure and honor to serve as Secretary of the General Convention.

The Rev. Canon Michael Barlowe, D.D.
Secretary of the General Convention and Executive Officer

A note about this year’s color for The Blue Book:

Even in its virtual form, I have retained the custom of selecting a particular shade of blue for the Reports to the General Convention. For this edition, the color I have chosen is “Cornflower” (hexadecimal color code #6F90F4), Cornflower Blue was, famously, used by the 17th century Dutch artist, Johannes Vermeer, and has been described by Picsart.com as representing “depth, tranquility, contemplation, and peace. It can also be used to convey a sense of idealism, trust, loyalty, sincerity, wisdom, confidence, and stability.” Cornflower blue seems a fitting color for times such as these. (<https://picsart.com/blog/post/cornflower-blue-color#>)

EXECUTIVE COUNCIL

Membership

The Most Rev. Michael Curry, <i>Chair, Ex Officio</i>	North Carolina, IV	
Ms. Julia Ayala Harris, <i>Vice-Chair, Ex Officio</i>	Oklahoma, VII	
The Rev. Canon Dr. Michael Barlowe, <i>Secretary, Ex Officio</i>	California, VIII	
Mr. N. Kurt Barnes, <i>Treasurer, Ex Officio</i>	New York, II	
The Rev. Devon Anderson	Minnesota, VI	2024
Dr. Liza Anderson	Minnesota, VI	2024
The Rev. Gina Angulo Zamora	Litoral Ecuador, IX	2027
Canon Annette Buchanan	New Jersey, II	2027
Mr. Thomas Chu	New York, II	2027
Mr. Tivaun Cooper	New York, II	2027
The Rev. Lillian Davis-Wilson	Western New York, II	2024
The Rev. Patricia Downing	Delaware, III	2024
The Rev. Canon Cornelia Eaton	Navajoland, VIII	2024
The Rev. M.E. Eccles	Chicago, V	2024
Ms. Blanca Echeverry	Colombia, IX	2024
Ms. Alice Freeman	North Carolina, IV	2024
Mr. Timothy Gee	El Camino Real, VIII	2027
Ms. Pauline Getz	San Diego, VIII	2024
The Rev. Angela Goodhouse	North Dakota, VI	2024
The Very Rev. Mark Goodman	Rio Grande, VII	2024
The Rev. Charles Graves	Texas, VII	2027
Mr. Scott Haight	West Tennessee, IV	2027
The Rt. Rev. Scott Hayashi	Utah, VIII	2024
Mr. Lawrence Hitt II	Colorado, VI	2027
The Rt. Rev. Anne Hodges-Copple	North Carolina, IV	2024
The Rev. Dr. Deborah Jackson	Florida, IV	2027
The Rt. Rev. Deon Johnson	Missouri, V	2027
The Rev. Anne Kitch	Newark, II	2024
Mr. Joe McDaniel	Central Gulf Coast, IV	2027
Canon Andrea McKellar	South Carolina, IV	2024
Ms. Louisa McKellaston	Chicago, V	2027
The Rev. Dr. Wilmot Merchant	South Carolina, IV	2027
Dr. Sandra Montes	Texas, VII	2027
The Rt. Rev. Rafael Morales	Puerto Rico, II	2027
The Ven. Aaron Perkins	Maine, I	2024
Ms. Diane Pollard	New York, II	2024
Ms. Betsy Ridge	Massachusetts, I	2027
The Hon. Rose Sconiers	Western New York, II	2024

Ms. Dianne Audrick Smith	Ohio, V	2027
Ms. Sarah Stonesifer Boylan	Washington, III	2024
Mr. Matthew Taylor	Washington, III	2027

Others with Seat and Voice

The Rev. Rachel Taber-Hamilton,	Vice President of the House of Deputies
The Rev. Geof Smith,	Chief Operating Officer, DFMS (until January 1, 2023)
Ms. Jane Cislucyis,	Acting Chief Operating Officer, DFMS (as of February 27, 2023)
Mr. Kent Anker,	Chief Legal Officer, DFMS
The Rt. Rev. Andrew Asbil,	Anglican Church of Canada Partner (until August 2023)
The Rev. Joanne Engquist,	Evangelical Lutheran Church in America Partner

Changes in Membership

Ms. Samantha Clare, Arkansas, VII resigned in October of 2023.

Mandate

Canon I.1.4

Canon 4: Of the Executive Council

Sec. 1

a. There shall be an Executive Council of the General Convention (which Council shall generally be called simply the Executive Council, or the Council) whose duty it shall be to oversee the execution of the program and policies adopted by the General Convention. The Executive Council shall have oversight of the work done by the Domestic and Foreign Missionary Society in its capacity as its Board of Directors. The Council shall have oversight responsibility for the disposition of the funds and other property of the Domestic and Foreign Missionary Society in accordance with the provisions of this Canon and the resolutions, orders, and budgets adopted or approved by the General Convention. The Executive Council shall also have oversight responsibility for the work of the Office of General Convention and the Executive Officer of General Convention who shall report directly to the Executive Council. It shall also have oversight responsibility for the disposition of the moneys of the Office of General Convention. The Council shall adopt procedures it deems appropriate for approval of expenditures by the Domestic and Foreign Missionary Society and the Office of General Convention.

b. The Executive Council shall be accountable to the General Convention and shall render a full, published report concerning the work of the bodies for which it has oversight responsibility to each meeting of the General Convention. The report shall include information on the

implementation of all resolutions adopted in the previous General Convention calling for action by the Executive Council, the Domestic and Foreign Missionary Society, and the Office of General Convention.

c. The Council shall exercise the powers conferred upon it by Canon, and such further powers as may be designated by the General Convention, and between sessions of the General Convention may initiate and develop such new work as it may deem necessary. Subject to the provisions of these Canons, it may enact By-laws for its own government and enact procedures for its own committees.

d. The Executive Council shall be composed (a) of 20 members elected by the General Convention, of whom four shall be Bishops, four shall be Presbyters or Deacons, and 12 shall be Lay Persons who are confirmed adult communicants in good standing (two Bishops, two Presbyters or Deacons, and six Lay Persons to be elected by each subsequent regular meeting of the General Convention); (b) of 18 members elected by the Provincial Synods; (c) of the following *ex officio* members: the Presiding Bishop and the President of the House of Deputies; and (d) the Chief Operating Officer, the Secretary of the General Convention, the Treasurer of the General Convention, the Chief Financial Officer of the Domestic and Foreign Missionary Society, and the Chief Legal Officer of the Executive Council, all of whom shall have seat and voice but no vote. Each Province shall be entitled to be represented by one Bishop or Presbyter or Deacon canonically resident in a Diocese which is a constituent member of the Province and one Lay Person who is a confirmed adult communicant in good standing of a Diocese which is a constituent member of the Province, and the terms of the representatives of each Province shall be so rotated that two persons shall not be simultaneously elected for equal terms.

e. The Executive Council shall appoint a committee from among its members to assist the Council to (i) advise the Joint Standing Committee on Nominations and the Provincial Councils on what skills, gifts and experience are needed on the Executive Council to enable it to function with maximum effectiveness, and whether those skills are at that time represented on the Executive Council, and (ii) create a description of the skills, gifts and experience requisite for service on the Executive Council, including the value of cultural and geographic diversity on the Council and the value of including historically underrepresented voices in the governance of the Church.

f. Of the Executive Council members elected by the General Convention, the Bishops shall be elected by the House of Bishops subject to confirmation by the House of Deputies, and the Presbyters or Deacons and Lay Persons shall be elected by the House of Deputies subject to confirmation by the House of Bishops.

g. Except in the case of members initially elected for shorter terms in order to achieve rotation of terms, the terms of office of the members of the Council (other than *ex officio* members) shall be equal to twice the interval between regular meetings of the General Convention. The terms of office of all members shall commence immediately upon the adjournment of the General Convention at which they were elected or, in the case of election by a Synod, upon the

adjournment of the first regular meeting of General Convention following such election. The term of a member shall become vacant in the event of two absences from meetings of the Council in the interval between successive regular meetings of the General Convention unless excused by the Chair or Vice Chair for good cause. Members shall remain in office until their successors are elected and qualified. No person who has served at least three consecutive years on the Executive Council shall be eligible for immediate re-election for a term of more than three years. After any person shall have served six consecutive years on the Executive Council, a period of three years shall elapse before such person shall be eligible for re-election to the Council.

h. Should any vacancy occur in the Council through death, resignation, disability, or other reason, with respect to a member elected by the General Convention, the Council shall fill such vacancy by the election of a suitable person to serve until a successor is elected by the General Convention.

i. Should any vacancy occur in the Council through the failure of any Provincial Synod to elect a member, or through the death, resignation, or removal from the Province of any such member, the Provincial Council of the Province shall appoint a suitable person to serve until the Provincial Synod shall by election fill the vacancy.

Summary of Work

Meetings

October 17-20, 2022	Phoenix, Arizona
November 30, 2022	Online
December 13, 2022	Online
February 9-12, 2023	San Francisco, California
June 12-15, 2023	Providence, Rhode Island
June 30, 2023	Online
October 24-27, 2023	Online
January 26-29, 2024	Louisville, Kentucky
April 18-20, 2024	Raleigh, North Carolina

The Executive Council was convened by Presiding Bishop Michael B. Curry as Chair and President of the House of Deputies Julia Ayala Harris as Vice Chair. At the beginning of the biennium, worship was organized by a small worship committee, convened by the Rev. Anne Kitch. In May of 2023, after the

Rev. Lester Mackenzie was appointed chaplain of the Executive Council, he assumed the role of planning worship.

The Council continued its focus on the ongoing work and conversation on racism. A working group was appointed to lead the work, chaired by The Rt. Rev. Scott Hayashi. Former Executive Council member, Ms. Zena Link, was engaged as a consultant in this work for the Council. Executive Council welcomed the Bishops and members of diocesan staff in each place in which Council met during the biennium, learning more about the local work of The Episcopal Church as it lives the priorities of the Jesus Movement.

Executive Council members were each appointed to one of four Joint Standing Committees: Governance & Operations, Finance, Mission Beyond the Episcopal Church and Mission Within the Episcopal Church. These Joint Standing Committees continued the work mandated by General Convention, and their reports will be found below.

EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON FINANCE

Members

Canon Andrea McKellar, Chair	South Carolina, IV	2024
Mr. Timothy Gee, Vice-Chair	El Camino Real, VIII	2024
The Rev. Anne E. Kitch, Vice-Chair	Newark, II	2024
Mr. Scott Haight, Secretary	West Tennessee, IV	2024
Mr. N. Kurt Barnes, Treasurer	New York, II	n/a
La Rvda. Gina Angulo Zamora	Litoral Ecuador, IX	2024
The Rev. Patty Downing	Delaware, III	2024
The Rev. Canon Cornelia Eaton	Navajoland Area Mission, VIII	2024
The Rt. Rev. Anne Hodges-Copple	North Carolina, IV	2024
The Rt. Rev. Deon Johnson	Missouri, V	2024
Ms. Diane Pollard	New York, II	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	

Acknowledgements

We would like to acknowledge the numerous contributions of the following staff: Mrs. Nancy Caparulo, Ms. Margareth Crosnier de Bellaistre, Mr. Patrick Haizel, Mr. Brian Murray, Mr. T. J. Houlihan, and Ms. Julia Alling.

Mandate

Oversight of the triennial budget and development of annual budgets. Development of the triennial General Convention budget. Oversight for the disposition of funds and other property of the DFMS. Development and Mission Funding. Review and recommend changes to the Audit Charter to Executive Council. Review Diocesan Financial Reports including Part II per Canon I.4.6(j). Monitor and review diocesan assessments.

Executive Council Bylaws - Section 3.c

(c) There shall be a Joint Standing Committee on Finance, which shall be responsible for reporting to the Council and the Society and recommending action on all financial, budgetary, or other such matters assigned to it from time to time by the Council, or the Society, or the Chair of the Council.

Summary of Work

Work:

The Committee's goal is to facilitate the ministry of The Episcopal Church in partnership with staff and other Executive Council Joint Standing Committees; to maintain close relationships with the General Convention through regular contact with the Joint Audit Committee of Executive Council and DFMS; and to support the work of the Office of the Treasurer.

Meetings:

The Joint Standing Committee on Finance (FIN) met at every regular Executive Council meeting and five additional times via Zoom meeting. The Treasurer of DFMS, as well as additional staff from the finance office and the development office were present at most meetings. DFMS staff periodically visited FIN meetings to offer their expertise regarding financial implications of their areas of oversight.

The regular work of FIN includes:

- Reviewing periodic financial statements and statements of operation for DFMS.
- Reviewing the work of the Office of Development
- Review of funding for grants from the budget and trusts
- Review of DFMS policies, e.g. Travel, CCSR Scope of Work Plan, Investment Policy, Audit charter
- Monitoring mission, governance, legal, and administrative expenses
- Monitoring and recommending adjustments to the 2023-2024 budget adopted by the 80th General Convention
- Recommendations for the establishment of custodial trust funds for various parishes and dioceses.
- Receiving reports from the Archives

FIN works with several interim bodies. The work includes:

- Receiving reports from the Audit Committee
- Receiving reports and recommendations from the Committee on Corporate Social Responsibility (CCSR)
- Reviewing Investment Committee recommendations and Policy
- Reviewing Economic Justice Loan Committee recommendations and process
- Receiving reports from the Assessment Review Committee (ARC) and monitoring the waiver process

As a final note, FIN thanks the DFMS staff who supported the work of FIN during the biennium with grace, competence, reliability, and faithfulness. Their work was exemplary, and this committee is exceedingly grateful.

EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON GOVERNANCE AND OPERATIONS

Members

The Rt. Rev. Scott Hayashi, Chair	Utah, VIII	2024
Ms. Pauline Getz, Vice-Chair	San Diego, VIII	2024
The Ven. Aaron Perkins, Secretary	Maine, I	2024
The Rev. Devon Anderson	Minnesota, VI	2024
Mr. Tivaun Cooper	New York, II	2024
Ms. Louisa McKellaston	Chicago, V	2024
The Rt. Rev. Rafael Morales	Puerto Rico, II	2024
Dr. Liza Anderson	Minnesota, VI	2024
The Hon. Rose H. Sconiers	Western New York, II	2024
Ms. Julia Ayala Harris, Ex Officio		
The Most Rev. Michael Curry, Ex Officio		

Changes in Membership

Mr. Lawrence Hitt, II	Colorado
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Mandate

Board governance and board development. Legal services, litigation and other legal matters. Copyright, trademark and intellectual property matters. Human Resources: approval of policies & Employee Handbook; compensation of officers; ministry review with Officers. Communications: branding; public relations & corporate image; website and other media. Information Technology Physical Plant, Facilities, Construction, Leases, Policies Archives Parochial Report per Canon I.6.1

Executive Council Bylaws - Section 3.b

b) (i) There shall be a Joint Standing Committee on Governance and Operations, which shall be responsible for reporting to the Council and the Society and recommending action on all governance, operational, administrative, or other such matters assigned to it from time to time by the Council, or the Society, or the Chair of the Council. (ii) The Chief Legal Officer shall report both in writing and in person to the Committee on Governance and Operations at each meeting of Executive Council about pending and anticipated legal matters including the legal work in support of significant transactions and donations, the status of litigation (including threatened litigation) in which The Episcopal Church is, or may be, a party (including upcoming decisions needed by The Episcopal Church and legal options of various courses of action in any such litigation), and any important regulatory, tax, property (including intellectual property), or insurance coverage matters that may affect The Episcopal Church's budget, financial soundness, operations or reputation for integrity. Where appropriate, the Chief Legal Officer will identify upcoming significant legal decisions, and The Episcopal Church's legal options and likely results in connections with such decisions. Appropriate portions of the reports shall be sealed in order to protect the attorney client privilege, but such reports shall be a part of the permanent record of the meeting. Appropriate portions of the in-person briefing may be held in executive session in order to protect the attorney client privilege with respect to pending or threatened litigation, or where otherwise necessary to maintain the privilege.

Summary of Work

COVID Protocols

Governance and Operations responded to the changing dynamics of the pandemic which had forced The Episcopal Church to adapt to the evolving crisis. One of the first items we addressed was to make recommendations to the Presiding Officers of our church regarding safety protocols. The recommendation was to update the working protocols to be in compliance with the CDC guidelines that had eased from the more restrictive safety guidelines that had been in place.

The return to in person meetings was a welcome change. As this was one of the first meetings in person after the pandemic, we reviewed the meeting policy with regard to personal safety and how to stay in compliance with CDC guidelines.

Advancing the Work of becoming Beloved Community on Executive Council

In response to C058 Resolution Requiring Action in Response to TEC's Racial Audit, Alexandria Link was invited to serve as a facilitator and guide to consult with a working group of members of The Executive Council to engage in deep conversations on racism as it manifested on Executive Council. In having these conversations we hope to build relationships among the members of Executive Council and to advance our steps to being Beloved Community. The ongoing conversations have been difficult but good. It is recommended that this work should continue into the next triennium.

Joint CPG-Executive Council Task Force.

The group heard a report from The Rev. Devon Anderson on the work of the joint group. The group is mandated by the Memorandum of Understanding to meet four times during the Biennium. The group has made progress in areas of communication, understanding of the needs of each group with respect to an ongoing, positive relationship, and building personal relationships. The work consisted of learning about each organization, including the different cultures, and acknowledged that building relationships will take time.

815 Second Avenue

The building was constructed in 1961 to house church offices and retail rental space. Currently, the building is not fully occupied and has leases worth approximately \$2.5 million annually. The carrying costs of the building are approximately \$3.1 million to \$3.2 million annually which includes a capital investment budget. The current value of the building is approximately \$60 million dollars. The building will be in need of continual maintenance and repairs and planning is required to meet the costs of this.

Parochial report

The group received the parochial report revision from the Committee on the State of the Church which will be used in 2024. The report has been made considerably smaller with a renewed focus on beneficiaries of outreach ministries by parishes, data collection around non-member participation, and information about any subsidiary or affiliated organizations operating in the parish.

Strengthening Communication within Interim bodies

Throughout the biennium, GO and the interim body committee of Structure, Governance, Constitution, and Canons has endeavored to practice good communication to both support each committee in it's efforts as well as prevent duplication of efforts. This has been largely successful and the committee recommends to the Presiding officers that they continue the practice of appointing a liaison to SGCC from GO to continue this practice.

Policy Review and Updating

Chief Legal Officer Kent Anker completed the Employee Handbook revision. The revision was reviewed and passed by GO and presented to Executive Council which voted to approve it. A new policy for the protection of children, youth and vulnerable adults was presented to and passed by GO and approved by The Executive Council. The policy was approved by GO. A policy formalizing the right of individuals to declare their preferred name and pronouns was passed by GO and approved by The Executive Council. Updates to Conflict of Interest were presented to and passed by GO and approved by The Executive Council.

General Convention site for the 82nd General Convention

General Convention Secretary Michael Barlowe presented the Joint Planning and Arrangements' Committee's choice of Phoenix for the 82nd General Convention in 2027.

A resolution regarding site selection of the General Convention was drafted and passed to be put before the Executive Council for site selection for the 83rd General Convention and beyond.

EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON MISSION BEYOND THE EPISCOPAL CHURCH

Members

The Very Rev. Mark Goodman, Chair	Rio Grande, VII	2024
The Rev. Charles Graves, Vice-Chair	Texas, VII	2027
Mr. Matthew Taylor, Secretary	Washington, III	2027
The Rev. Lillian Davis-Wilson	Western New York , II	2024
Ms. Alice Freeman	North Carolina, IV	2024
Prof. Lawrence Hitt II	Colorado, VI	2027
The Rev. Dr. Deborah Jackson	Florida, IV	2027
The Rev. Canon Dr. Wilmot Merchant	South Carolina, IV	2027
Dr. Sandra Montes	Texas, VII	2027
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	

Changes in Membership

Mr. Larry Hitt was reassigned to the Joint Standing Committee on Government and Operations at the October, 2023, meeting of Executive Council and for the remainder of the bi-ennium.

Mandate

To assist the Executive Council in highlighting issues and in the development of ministry beyond The Episcopal Church. Special areas of focus include Global Partnerships, Anglican Communion, Covenant Committees and Bilateral Relationships, Episcopal Migrations Ministries, Ecumenical and Interreligious Partnerships and Dialogues, Domestic Government Policy via the Office of Government Relations, International Policy and Social Justice work, and Episcopal Relief and Development.

Executive Council Bylaws - Section 3.e

(e) There shall be a Joint Standing Committee on Mission Beyond The Episcopal Church, which shall be responsible for reporting to the Council and the Society and recommending action on global partnerships, covenant relationships, ecumenical and interreligious partnerships, or other such matters assigned to it from time to time by the Council or the Society, or the Chair of the Council.

Summary of Work

Our collaborative work comes under the auspices of Mission Beyond: Global Partnerships, Anglican Communion, Covenant Committees and Bilateral Relationships, Ecumenical and Interreligious Partnerships and Dialogues, Domestic Government Policy via the Office of Government Relations, International Policy and Social Justice, and Episcopal Relief and Development. In addition, during this biennium the Joint Standing Committees on Mission Beyond, and Mission Within, The Episcopal Church met for one joint session at each meeting of The Executive Council, hearing staff and department reports together and working on resolutions that bridge the normal areas of focus of our respective committees. This has been fruitful and rewarding work. Deputies, and other readers, are encouraged to read the summaries of the excellent work being accomplished by these areas of Mission Beyond The Episcopal Church in their respective Blue Book Reports. A summary of Mission Beyond's resolutions which were presented to and approved by the Executive Council follow:

JSC on Mission Beyond TEC: Summary Table of Resolutions

October, 2022, Phoenix, Arizona

MB001—Consent to Elections to the Board of Episcopal Relief and Development

MB002—On the Topic of War in Afghanistan and Afghan Refugees

February, 2023, San Francisco, California

MBMW001—Black History Month

MB003—Resolution on the Devastating Earthquake in Turkey and Syria

June, 2023, Providence, Rhode Island

MBMW002—Biodiversity

MB004—Receive a Proposal for Exchangeability of the Diaconate between The Episcopal Church and The Evangelical Lutheran Church in America

MB005—Encouraging The United Methodist Church

MB006—Consent to the Elections to the Board of Episcopal Relief and Development

MB007—Expressing Grave Concern over Legalized Homophobia in Uganda

MB008—Grant from China Trust to the Church of Our Savior

MBMW003—Courtesy Resolution for Bishop Andrew Asbil, liaison from The Anglican Church of Canada

CONCLUSIONS AND RECOMMENDATIONS

The Executive Council's Joint Standing Committee on Mission Beyond The Episcopal Church, led by the Chair Mark Goodman, took care during a shortened term (the biennium) to focus on building relationships both within Mission Beyond and with members of the Joint Standing Committee on Mission Within The Episcopal Church. It is vital that, as world events present opportunities for The Executive Council to speak meaningfully on issues of justice, human rights, equality and dignity for all people, that our relationship provide a strong foundation for our work together. In the press for time that all on Executive Council experienced during this biennium, there was frustration at not having a longer time frame for our work, and Mission Beyond, as is true for each Joint Standing Committee, met that challenge with meaningful and essential actions. The Chair and members of Mission Beyond recommend that the practice continues of meeting jointly with Mission Within at each Executive Council meeting, as creative and energizing opportunities are created in that context.

EXECUTIVE COUNCIL JOINT STANDING COMMITTEE ON MISSION WITHIN THE EPISCOPAL CHURCH

Members

Dr. Sarah Stonesifer Boylan, Chair	Washington, III	2024
Canon Annette Buchanan, Vice Chair	New Jersey, II	2024
Ms. Betsy Ridge, Secretary	Massachusetts, I	2024
Mr. Thomas Chu	New York, II	2024
The Very Rev. M.E. Eccles	Chicago, V	2024
Sra. Blanca Echeverry	Colombia, IX	2024
The Rev. Angela Goodhouse	North Dakota, VI	2024
Mr. Joe McDaniel	Central Gulf Coast, IV	2024
Ms. Dianne Audrick Smith	Ohio, V	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	

Changes in Membership

Ms. Samantha Clare left Executive Council in September 2023 due to a change in Provincial residence.

Mandate

Evangelism, Church Planting, Congregational Redevelopment. Racial Justice and Reconciliation. Care of Creation and Environmental Stewardship. Formation and Education. Public Policy and Social Justice. Relevant Grants Review.

Executive Council Bylaws - Section 3.d

(d) There shall be a Joint Standing Committee on Mission Within The Episcopal Church which shall be responsible for reporting to the Council and the Society and recommending action on local, diocesan, provincial, and churchwide ministries authorized by General Convention and the Council, or other such matters assigned to it from time to time by the Council, or the Society, or the Chair of the Council.

Summary of Work

Transparency was a main theme of this biennium's Joint Standing Committee on Mission Within The Episcopal Church. A secondary theme was the importance of strategic decision-making and discernment based on needed data and program evaluation. The final major theme was learning from the COVID-19 pandemic, a time of pivot, change, and adaptive leadership, and how that will impact the future church. During the meeting years of 2022-2024, Executive Council and, subsequently, the Joint Standing Committee met six times. This shortened span in-between General Conventions greatly impacted the momentum of this body. As of the writing of this report (December 2023), the Joint Standing Committee witnessed to and supported the major themes in:

- **D006: Resolution Establishing Equity in The Awarding of TEC Grants:** Each grant-giving body gathered data on the communities that will receive the monies and who they are attempting to reach. This data was reported to Mission Within along with other application information when the grant reviewers submitted the recommendations to Executive Council.
- **Endowed Gifts:** Mission Within considered transparency and clarity around the intent and distribution of endowed grants and granting processes. This effort was a continuum of the previous triennium's report on the General Convention-funded granting programs that was created in collaboration with all Joint Standing Committees.
- **Oversight:** Mission Within requested updates on the progress of the Constituting Group on the Episcopal Coalition for Racial Equity and Justice, the creation of the staff position for Gender Justice Ministries, Missioner for Asiamerica Ministries, and appointments associated with the work of investigating The Episcopal Church's involvement in Indigenous Boarding Schools. These requests continue the commitments given to the church from the 80th General Convention in Baltimore.
- **Strategic Future of the Church:** In our June 2023 meeting, all of Executive Council heard about the current data landscape as understood by transitions ministry numbers, annual parochial reports, and Church Pension Group ordination records and compensation information. Mission Within also heard from the Church Planting and Redevelopment officers how and what this unique group of church leaders have learned during and since the pandemic.
- **Becoming Beloved Community:** Within Executive Council's work, the Joint Standing Committee's efforts, grant reports, and staff presentations repeated the importance of striving to become a beloved community integrated into all aspects of ministry and leadership.
- **Learning from COVID:** In the staff reports, presentations, and committee members' sharing, there was a common understanding that we, as a church, needed to learn from the pandemic era pauses and shifts. The committee noted the program evaluation and staff realignment under future presiding bishops' tenures. There was an emphasis on the program evaluation of churchwide ministries that would then impact triennial budgetary requests.

- Collaboration with Interim and Grant-making Bodies: Mission Within worked with several other interim bodies and committees to disperse grants throughout the church. These included such bodies as the Task Force on Care of Creation and Environmental Racism, the Evangelism Grants Committee, the Task Force on Church Planting and Congregational Redevelopment, United Thank Offering, Roanridge Trust Grants, Constable Fund Grants, and Young Adult and Campus Ministry grants among others.

Some of our work included updating resolutions on hate crimes, forced adoptions, creation care and the environment. We were also enriched by the planning and evaluation of the “It’s All About Love” revival in July 2023, and we have been energized by the learnings from the church planters and new Episcopal communities gathered in the biennium. As is listed in the Mission Within mandate and purview, this Joint Standing Committee responds to the current and near-future needs of local, diocesan, provincial, and churchwide ministries. This critical and vital aspect of The Episcopal Church’s stewardship, staffing, and ongoing commitment is the heartbeat and Christ-centered future of our discipleship efforts and needed strategic vision.

EXECUTIVE COUNCIL CONANT FUND GRANT REVIEW COMMITTEE

Members

The Rev. Anne E. Kitch, Chair	Newark, II	2024
Ms. Diane Butler	Rio Grande, VII	2024
Ms. Samantha Clare	Arkansas, VII	2024
Karen Grane	Virginia, III	2024
The Rev. Trisha Thorme	New Jersey, II	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024
Mr. N. Kurt. Barnes, Treasurer	New York, II	2024
Ms. Ann Hercules, Staff		2024

Changes in Membership

The Rev. Deacon Trisha Thorme was appointed in March of 2023

Ms. Diane Butler resigned from the committee in April of 2023

Representation at General Convention

Deputies Anne Kitch and Trisha Thorme are authorized to receive non-substantive amendments to this Report at the General Convention

Acknowledgements

The Committee would like to acknowledge Ann Hercules, Associate for Ministry Beyond the Episcopal Church, for her excellent work on behalf of the committee, applicants, and recipients.

Mandate

The Executive Council Conant Fund Grant Review Committee is charged with receiving, reviewing and making recommendations for awards funded by Trust Fund 649, the William Schubael Conant Fund. Conant Grant funds are provided for the improvement of seminary-based theological education. Specifically, the grants are directed for the support of theologically academic research, textbook preparation, and course development undertaken by faculty members, normally during a sabbatical break, at the recognized Episcopal seminaries in the United States.

Summary of Work

The Committee met via Zoom in 2023 on January 5, January 23, and February 21.

The Committee received 25 applications with total funding requests of \$276,453. The requested amount exceeded available funds by more than \$125,000. One application was ineligible as it came from a seminary outside of the United States.

The committee awarded 19 grants:

1. Sheryl Kujawa-Holbrook, Bloy House 5,933.00
Dismantling White Christian Nationalism: A Christian Formation Perspective
2. Ruth Meyers, Church Divinity School of the Pacific 14,022.00
Worship in Multiracial Congregations
3. Jennifer Snow, Church Divinity School of the Pacific 8,230.00
Exploring Chinese Christianity
4. Richard Cogill, School of Theology, University of the South-Sewanee 14,298.00
Leadership in the Public Square
5. James Tengtenga, School of Theology, University of the South-Sewanee 7,535.00
Mission in Context: Inculturation in The Anglican Church in Malawi
6. Hilary Bogert-Winkler, School of Theology, University of the South-Sewanee 9,000.00
"The Free National Church of Ireland": Responses to the 1647 Proscription of the Book of Common Prayer
7. Romulus Stefanut, School of Theology, University of the South-Sewanee 5,430.00
Philo of Alexandria: Recent Reception and History of Effects
8. Andrew Thompson, School of Theology, University of the South-Sewanee 7,251.00

- The Tree at the End of the World: The Tree of Peace
9. Awa Jangha, Seminary of the Southwest 9,675.00
An Exploration of Narratives for Use in Teaching and Advising
10. Claire Colombo, Seminary of the Southwest 8,750.00
Theological Discourse in the Seminary Contexts of Gerard Manley Hopkins
11. Steve Bishop, Seminary of the Southwest 3,756.00
Reception History of the Penitential Psalms
12. Robert Heaney, Virginia Theological Seminary 3,300.00
Conflict in Modernities
13. Sharon Heaney, Virginia Theological Seminary 3,000.00
In Conversation with Latino/a Theologies: On Ireland and on Women
14. Marty Wheeler Burnett, Virginia Theological Seminary 6,000.00
Book Project: Shapers of The Hymnal 1982
15. John Yieh, Virginia Theological Seminary 15,000.00
Biblical Interpretation in the Anglican/Episcopal Seminaries in Taiwan and in Japan
16. Ross Kane, Virginia Theological Seminary 4,500.00
Building Public Scholarship on Christian Politics
17. John Knight, Virginia Theological Seminary 6,632.00
Original Sin: Perspectives from New Research on Self-Deception
18. Rode Molla, Virginia Theological Seminary 2,600.00
A Postcolonial Practical Theology of Children: Nurturing the Spirituality of Children and Families in the 21st Century
19. Melody Knowles, Virginia Theological Seminary 8,000.00
Book: How to Read a Psalm

EXECUTIVE COUNCIL CONSTABLE/ROANRIDGE FUND GRANT REVIEW COMMITTEE

Members

The Very Rev. M.E. Eccles, Chair	Chicago, V	2024
Ms. Betsey Bell	Ohio, V	2024
Tom Brackett	Western North Carolina, IV	2024
Ms. Samantha Clare,	Arkansas, VII	2024
Ms. Margareth Crosnier de Bellaistre	New York, II	2024
Ms. Betsy Ridge	Massachusetts, I	2024
The Rev. Jemonde Taylor	North Carolina, IV	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024

Acknowledgements

We would like to thank the Rev. Molly James for her hard work.

Mandate

GAM 013 (2011) Constable Grant

To broaden participation from the wider church in the application review process and get the Executive Council involved earlier in the process. Membership includes three members of the Executive Council Standing Committee on Local Ministry and Mission, a person from the General Convention Office, a person with broad grant experience, a person from the Finance Office and a staff person with program responsibility from the Mission Department at the Church Center. Chair and Vice Chair appoint.

Roanridge Grant

HISTORY: The Cochel family originally gave a working farm in Missouri called Roanridge to the Episcopal Church to provide a unique setting in which Episcopal clergy, seminarians, and lay people could develop an understanding of farming operations and rural community structure. Through educational programs such as conferences, seminars, and institutes, the non-profit corporation that managed Roanridge sought to help Episcopal clergy and laity better serve communities in rural and small-town America. The farm was eventually sold and the Roanridge Trust was established.

Summary of Work

In February 2023, the Episcopal Church Executive Council approved the awarding of seven Constable Fund grants and eight Roanridge Trust grants—totaling over \$487,000.

Constable Grant:

The seven grants listed below total \$245,729.00. The distribution of the grants is subject to the full payment of the 2022 diocesan assessment or granted diocesan waiver.

Christ the King Center – Education and Training Initiative; (provide educational and training programs to assist parishes in their work and ministry, enhanced by filming, editing, and creating a web-based resource library for those unable to travel to the camp and conference center)

Diocese of Albany, \$20,000.00

The Philadelphia Eleven (provide funds to finish and release this feature length film that tells the story of the women ordained as priests in Philadelphia in 1974)

Ecumenical and Interreligious Religious Relations (EIRR), \$45,000.00

Tri-Faith Emerging Clergy Seminar; (Tri-Faith Initiative to provide courageous multi-faith conversations and collaborations among emerging religious leaders modeling the importance of interfaith relationships)

Diocese of Nebraska, \$20,000.00

Funding Assistance for Boys Home; (Develop Pilot Character Development Program for Youth throughout the Diocese and beyond)

Diocese of Southwestern Virginia, \$20,000.00

Trinity Spiritual Center; (continuing to create a new model of education geared toward “the fastest-growing segment of spiritual seekers in the US: nones”.)

Trinity, Southport, \$45,000.00

Creation of Libraries to Support Leadership Formation; (Bishop Kemper School for Ministry)

Diocese of Western Kansas, \$5,729.00

Diaconal Formation Pilot Process and Platform; (create an affordable, accessible, adaptable, and scalable online process for individuals to prepare for diaconal ministry and build a platform for sharing resources for use both before and after ordination to the diaconate)

Province VIII, \$90,000.00

Roanridge Grant

The eight grants listed below total \$241,949.00. The distribution of the grants is subject to the full payment of the 2022 diocesan assessment or granted diocesan waiver.

Bilingual, Bicultural Youth, Young Adult, and Adult Formation and Evangelism (funds for St. John's Church in Bisbee, working with yoked congregation St. Stephen's Church in Douglas, to continue youth, young adult, and adult formation and education, with an emphasis on evangelism)

Diocese of Arizona, \$7,400.00

Connecting Rural Colorado to our Global Human Family (establish a Faith Formation program for adults of all ages in rural Colorado, paying particular attention to young adults who are increasingly feeling disenfranchised from religious institutions).

Diocese of Colorado, \$45,000.00

Constellation Ministry (strengthening the capacity and sustainability of local congregations by creating community and collaboration between lay leaders and clergy serving congregations that are in geographical constellations)

Diocese of Vermont, \$44,170.00

Community Dinner at The Playground (a new model of church called The Playground where community is gathered and formed at a play area and café on St. Stephen's land with a monthly Community Dinner to help seed the community)

Diocese of Northern California, \$13,400.00

Visitors Weekends (participants from dioceses around The Episcopal Church and beyond come to be immersed in an extended weekend of shared ministry ecclesiology, personal reflection, theological discussion, and strategic visioning)

Diocese of Northern Michigan, \$28,500.00

Stabilize and Grow (funds to mitigate bottleneck in processing routine payments, filing forms, etc. that fall under administrator position)

Diocese of South Dakota, \$58,479.00

Central Oahu Food Security Collaborative and Disaster Preparedness Collaborative (develop a 3-year program toward education, training, and organizing a Collaborative that would provide increased food security and disaster readiness for rural communities in central Oahu)

St. Stephen's, Diocese of Hawai'i, \$20,000.00

Revitalizing and Supporting Lay Preachers and Worship Leaders (In partnership with the dioceses of Bethlehem, Maryland, and Pittsburg, this grant will fund a curriculum review, cohort program development, facilitators, and underwriting costs to equip a new generation of lay leaders to gather our faith communities in prayer and worship)

Stevenson School for Ministry, Diocese of Central Pennsylvania, \$25,000.00

EVANGELISM GRANT REVIEW COMMITTEE

Members

Mr. Billy Boyce, <i>Co-Chair</i>	Massachusetts, I	2024
Ms. Samantha Clare, <i>Co-Chair</i>	Arkansas, VII	2024
Ms. Andrea Farley	Spokane, VIII	2024
Ms. GJ Gordy	Navajoland, VII	2024
The Right Rev. Craig Loya	Minnesota, Prov VI	2024
El Rvdo. Daniel Malfa	Columbia, IX	2024
The Rev. Grant Mansfield	Newark, II	2024
The Rev. Whitney Rice	Missouri, V	2024
The Rev. Timothy Seamans	California, VIII	2024
The Rev. Nelson Serrano	San Joaquin, VIII	2024
The Rev. Kelly Steele	Georgia, IV	2024
Ms. Cornelia Taylor	Southern Virginia, III	2024

Representation at General Convention

Deputy Billy Boyce and Bishop Craig Loya are authorized to receive non-substantive amendments to this Report at the General Convention.

Acknowledgements

The committee would like to acknowledge the support of Sarah Alphin, Associate for Church Planting and Evangelism, and Jerusalem Greer, Manager for Evangelism and Discipleship, for their excellent work on behalf of the committee, applicants, and recipients.

Mandate

The Evangelism Grant Review Committee is responsible for implementing a small grants program to encourage local worshipping community and diocesan evangelism efforts.

Summary of Work

The Committee met two times in 2023, May 25 and June 28, on zoom to establish a theme and timeline for the 2024 grant process. The chairs and staff hosted an informational webinar on August 28, 2023. As of the writing of this report the application is open and receiving grant submissions.

SCHOLARSHIP GRANT COMMITTEE

Members

The Rt. Rev. William Klusmeyer, <i>Chair</i>	West Virginia, III	2024
Mr. N. Kurt Barnes	New York, II	2024
The Rev. Dion Crider	Oklahoma, VII	2024
Ms. Margareth Crosnier de Bellaistre	New York, II	2024
Ms. Penny Grinage	Long Island, II	2024
The Rev. Dr. Deborah Jackson	Florida, IV	2024

Changes in Membership

The Rt. Rev. William Klusmeyer, resigned effective November 1, 2023

Mandate

Scholarship Program

As a result of bequests, The Domestic and Foreign Missionary Society of the Protestant Episcopal Church (DFMS) makes available a modest number of scholarships that assist students primarily enrolled in theological education and specialized training. Funding for the program is derived from annual dividends of designated trust funds established by generous donors. Several other trusts benefit children of current and former missionaries.

Currently there are forty-three trust funds available for scholarships. The oldest scholarship trust fund, The Mary E. Hinman Fund, was established in 1879.

The program is administered by a Scholarship Committee composed of a Member of Executive Council, a member of the church at large, the Canon of the Presiding Bishop staff for Ministry within The Episcopal Church; the Director of Human Resources; and representatives from various ministries at The Episcopal Church and the Treasurer's Office. The Scholarship Committee meets once a year in the spring to review applications and award scholarships.

Prior to the Scholarship Committee meeting, Sub Committees meet and make their respective selections. Sub Committees consist of the missioner and other selected people for each ministry involved (e.g., Black, Asian, Native American and other).

Summary of Work

The Episcopal Church awards scholarships of up to \$10,000 for educational purposes to a variety of constituents within the broader Episcopal community. The scholarships are derived from annual income of designated trust funds established by generous donors through bequests to The Episcopal Church.

The program is administered by a Scholarship Committee composed of a member of Executive Council, a member of the church at large, the Canon to the Presiding Bishop for Ministry within The Episcopal Church, the Director of Human Resources, and representatives from various ministries at The Episcopal Church and the Treasurer's Office. Prior to the Scholarship Committee meeting each spring, Sub-Committees meet and make their respective recommendations. The Scholarship Committee reviews applications and approves award recommendations.

Some of the scholarships support students enrolled in theological education and training. Other scholarships are available for educational training for ethnic communities, children of missionaries, bishops and clergy, and other groups, covering a wide range of eligibility. Currently there are forty-three trust funds available for scholarships. The oldest scholarship trust fund, The Mary E. Hinman Fund, was established in 1879.

During the 2021-2022 academic year, awards totaling \$310,755 were made to 111 students; during the 2022--2023 academic year, awards totaling \$388,071 were made to 131 students; and during the 2023-2024 academic year, awards totaling \$390,216 have been awarded to 131 students.

ADVISORY GROUP ON CHURCH PLANTING AND REVITALIZATION

Membership

The Rt. Rev. Frank S. Logue, Chair	Georgia, IV	2024
Canon Katie Forsyth, Sub-Committee Chair	Eastern and Western Michigan V	2024
The Rev. Eric Metoyer, Sub-Committee Chair	California VIII	2024
Mr. James Dowd	Nebraska VI	2024
The Rev. Canon Jane Gerdson	Southern Ohio V	2024
The Rev. Adrienne Hymes	Southwest Florida IV	2024
The Rt. Rev. Deon Johnson	Missouri V	2024
The Rev. Gray Lesesne	Indianapolis V	2024
The Rev. Alex Montes Vela	Texas VII	2024
The Rev. Hunter Ruffin	Arizona VIII	2024
The Rev. Clive Samson	Missouri V	2024
The Rev. Canon Joann Saylor	Texas VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina IV	
President Julia Ayala Harris, Ex Officio	Oklahoma VII	

Acknowledgements

We express our deep gratitude to the Revs. Tom Brackett, Katie Nakamura Rengers, Samuel Borbon and Anthony Guillen from the Episcopal Church Center, and consultant Mr. Steve Matthews for their collaboration and mutual ministry with us over the biennium.

Mandate

2022 - A095

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

Resolved, That the Church continues to prioritize establishing new Episcopal communities and strengthening existing ones that are especially committed to mission and evangelism engaging people historically underserved and/or under-represented by the Church, for example, people of color, immigrants and refugees, youth, young adults, people who are gay, lesbian, bisexual or transgender (LGBTQI+), gender non-conforming people, people living in poverty, people with disabilities and/or all others who are disenfranchised from the Church; and be it further

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

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

And be it further

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

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

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

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

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

2022 - A096

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

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

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

Resolved, That in the revitalization of congregations, the Church continues to prioritize commitment to mission and evangelism engaging people historically underserved and/or under-represented by the Church, for example, people of color, immigrants and refugees, youth, young adults, people who are gay, lesbian, bisexual or transgender (LGBTQI+), gender non-conforming people, people living in poverty, people with disabilities and/or all others who are disenfranchised from the Church; and be it further; and be it further

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

- \$100,000 to engage Bishops and the diocesan representative(s) they appoint in development of a framework for congregational revitalization, identifying roadblocks that regularly thwart this work and identifying resources that are proven to enhance this work;
- \$100,000 to engage clergy and lay leaders in gleaning learnings from congregational revitalization that they have successfully done and/or they have failed in attempts to do, identifying roadblocks that have thwarted their work and identifying resources that have enhanced their work;
- \$100,000 for translation services and to facilitate participation of Spanish-speaking lay and ordained leaders in training for congregational revitalization;
- \$200,000 for further development of five-phase congregational redevelopment strategy - (1) diagnosing/assessing resources and challenges, (2) discerning next calling, (3) connecting

with local and diocesan partners, (4) iterating and continued resourcing, and (5) evaluating, refining and sustaining

- \$1,000,000 to support a team of local and regional church-wide office staff to oversee the work; and
- \$500,000 to provide mentorship/coaching/training for lay and ordained leaders in revitalization of their congregations.

And be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$2,000,000 for the implementation of this resolution.

Summary of Work

The 80th General Convention created an Advisory Group on Congregational Revitalization as approved by Resolution 2018-A096, but did not provide a Task Group to oversee the grants funded through Resolution 2018-A095. The members of the Advisory Group offered to oversee the New Episcopal Communities grants program and adopted the name Advisory Group on Church Planting and Revitalization with the approval of the General Convention Office and notification to the Executive Council. The Advisory Group met once in person in Linthicum Heights, Maryland, and frequently on Zoom as needed to complete our work.

Our primary tasks in this biennium were:

- making recommendations to Executive Council about New Episcopal Community grants to be awarded,
- continuing to identify potential planters and revitalizers, and supporting the existing network of coaches,
- working with staff on training church planters and revitalizers,
- and reviewing the results of previous grants to assess our effectiveness in starting and supporting New Episcopal Communities.

In doing this work prayerfully, we kept before us the important charge in Resolution 2018-A096, “in the revitalization of congregations, the Church continues to prioritize commitment to mission and evangelism engaging people historically underserved and/or under-represented by the Church, for example, people of color, immigrants and refugees, youth, young adults, people who are gay, lesbian, bisexual or transgender (LGBTQI+), gender non-conforming people, people living in poverty, people with disabilities and/or all others who are disenfranchised from the Church.” This was in keeping with Resolution 2018-D005 Establishing Equity in the Awarding of TEC Grants.

The grants program was completed prior to this Blue Book report. The work of review and assessment continued with a plan to publish the findings to the Church through church media and social media prior to the 81st General Convention.

New Episcopal Communities

Our Advisory Group’s top priority was to get out a call for New Episcopal Community Grants in two cycles timed so our recommendations could be sent to the Executive Council for their approval in funding these initiatives. The first task was to propose to the Executive Council a budget for the biennium given that the work authorized by 2018-A095 had a proposed budget of \$5.8 million, but the General Convention approved only \$1,026,000 for 2023-2024 for these budget line items within \$666,000 in the carry over budget for 2022.

The Advisory Group notified the Executive Council that the full \$5.8 million provided for in the resolution would have been less than needed to have the transformational impact on our church that is possible. But, given the constraints of the budget, the Advisory Group worked with Episcopal Church Center staff to set amounts below for grants and the ongoing support needed to continue the existing church wide network of support for new ministry developers while expanding our mission and evangelism to engage people historically underserved and/or under-represented by the Church.

The Advisory Group established a budget allocating the following to the goals of 2018-A095:

- \$70,000 for two church-wide Genesis Gatherings,
- \$20,000 for coach cohorts,
- \$2,000 for coaching for discernment grants,
- \$20,000 to either send Latino and other bilingual leaders to training offered by another denomination or hire a consultant to help design and implement leadership discernment and training in these contexts, and
- \$914,000 for grants in up to three grant cycles timed for approval in Executive Council meetings in 2023 and the first in 2024.

The Advisory Group knew more grants were likely for the first and second cycle with few in early 2024. We received so many good applications that we approved grants expending all funds in two grant cycles with deadlines for applications on May 1 and August 1, 2023. The available funds for grants submitted for the August 1 deadline were far short of what was needed for qualified applications. The Advisory Group reduced the amounts of the most grants in this cycle from the maximum, so that an excellent grant application for \$30,000 might receive \$15,000 or \$20,000. In making these decisions, the Advisory Group members prioritized funding for communities specifically gathering people of color and LGBTQ+ persons.

In support of our call for grant applications, the Group revisited our understanding that New Episcopal Communities (NECs) are:

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

Episcopal: Grounded in the faith, doctrine and discipline of the Episcopal church: NECs are clearly, distinctly and overtly Christian in character, approach and identity. NECs operate out of and give opportunities to know Jesus' love. While not all will start out holding weekly or traditional worship services, they are growing toward a regular rhythm of prayer, spiritual formation and celebration of God's love in their midst. NECs are under the oversight of the Bishop and are in relationship with other

parishes and entities of their diocese. They reflect the mission of their diocese and the Episcopal Church.

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

With this clear definition for an NEC, we continued the plan from 2018-2022 using a system of progressively larger grants that may be awarded over time if targets are met. In addition to finding, we offer a relationship of ongoing support, mentoring, and connectivity with our grantees. The progressive larger grants are:

- **Discernment Grants:** Up to \$5,000 to fund the discernment season of a New Episcopal Community. Funds may be used for sending the potential point leader to a gifts assessment retreat, coaching, training, demographic studies, micro-experiments, visits to similar types of ministries, and more.
- **Seed Grants:** Up to \$30,000 to fund the initial stages of a New Episcopal Community's launch. A seed grant recipient is typically in the first and/or second year of its life cycle. A seed grant application has a strong and realistic ministry plan, the beginnings of a core team, and support from its local diocese.
- **Growth Grants:** Up to \$30,000 to help fund approximately the second and third years of a New Episcopal Community.
- **Harvest Grants:** Up to \$40,000 to help fund the later stages of a New Episcopal Community's launch (approximately years three to six).

Discipleship and Worship: In creating the grant applications and in the call for grants, we emphasized a key learning from the last triennium that discipleship and worship are essential elements of New Episcopal Communities. This comes from experience of the last decade showing that the most vibrant New Episcopal Communities are ones who have a deep sense of missional identity which, as followers of Christ, will involve discipleship and/or worship. This is not to say that discipleship and worship have to follow traditional models. In many cases New Episcopal Communities are finding ways of embodying the way of Jesus that are unique to their own context. Yet, these elements are essential to thriving new communities.

Bi-Cultural and Multi-Cultural Ministry: We struggled as we found ourselves rejecting proposals that supported new bi-cultural and multi-cultural ministries as this needed work falls outside support offered by the resolution for New Episcopal Communities. The issue was most acute in fostering Latino

engagement as this work happens best in existing buildings with the existing congregation. This is work the Advisory Group wanted to support and knows the church wants to happen based on 2018-D005. Yet these new ministries do not meet the objectives set out in Resolution 2018-A095 or similar resolution in 2012, 2015, and 2018. This work is one type of revitalization, yet also falls well outside the scope of 2018-A096. During our in-person meeting in Maryland, we brought Episcopal Church Center staff member the Rev. Samuel Borbon in on Zoom. He was helpfully clear that best practice is for the Latinos who come to the church to become a part of the existing congregation and so they don't look like the expectations of a new community. With the support of the Mission Within the Episcopal Church Committee of Executive Council, we petitioned Council to approve a small amount of funds with grant language that would support approving grants to new multi-cultural ministries. The Executive Council allocated \$75,000 from another area of the same part of the church wide budget to this purpose. Those additional grants are reported above.

As of October 1, 2023, we have considered 51 applications for granting and support of New Episcopal Communities over the biennium. These resulted in our granting:

- 6 Discernment grants, totaling \$30,000.00
- 12 Seed grants, totaling \$255,000.00
- 4 Growth grants, totaling \$75,000.00
- 11 Harvest grants, totaling \$285,000.00

Our 38 grantees represent 24 dioceses of the Episcopal Church. In both grant cycles, more than 70% of the New Episcopal communities we supported fulfill the General Convention's mandate of ministry with underrepresented groups, including youth and young adults, differently abled persons, people identifying as members of LGBTQIA communities, people of color, poor and working-class people, people with a high school diploma or less, and/or people with little or no church background or involvement.

The Genesis Gathering 2023

In October, 2023 we gathered over 85 leaders at St. Mary's, Koreatown Los Angeles, including grant recipients, seasoned New Episcopal Community leaders, lay and ordained congregational redevelopers, and coaches. The week consisted of shared worship, workshops, learning journeys and a keynote speaker. This was by far the most diverse and vibrant Genesis Gathering we have hosted and was a window into the work of the last two triennia in terms of prioritizing leaders and communities that are historically underrepresented in The Episcopal Church.

Congregational Revitalization

The Advisory Group also oversaw the General Convention's mandate to create a church wide Community of Practice that works with existing congregations and their bishops to help them

redevelop to better engage the cultural realities of their communities for the sake of launching new ministries and multi-cultural missional initiatives. In 2022 - 2024 five (5) church redevelopment grants totaling \$89,150.00 were distributed to four dioceses.

The initiative started in 2018-2022, Genesis II: Re-Vision and Renew, continued in this biennium. This innovative ministry redevelopment initiative strengthens parishes for the challenging, yet exciting, work of launching new ministries in their neighborhoods. Genesis II has a particular focus on the practice of building relationships with fellow parishioners and with our wider community as through these relationships a congregation will discover the ways God is active in and around our congregations. We offered the following support:

- **Second Tuesdays at 2** - these were monthly conversations and an experimental redevelopment lab available to leaders across the church – lay and clergy. Designed as an entryway for interested leaders, the conversations required no ongoing commitment to participate. Those attending learned more about opportunities that invite a deeper dive into “Re-visioning and Renewing” for the sake of launching new ministries.
- **Coaching Cohorts** - Core teams of 4-5 lay leaders from five congregations came together twice-monthly on Zoom for 90-minute sessions under the leadership of a coach trained in group coaching and experienced in church leadership. The commitment was six months with the \$900 shared equally by the congregation, the diocese, and the funds set aside by GC2018. In these groups, leaders articulate their mission, map their assets, partner with their neighbors, risk new things, evaluate their progress, hone their practice, and continue this cycle.
- **Practicing Communities** - comprised of five or more congregations from within a diocese (already engaged in redevelopment). These met together online twice a month to learn skills, collaborate as a cohort, and innovate new ways of being church today. The participants were given support by committed members of a Wisdom Community of mentors and coaches who brought their experience of redevelopment for the sake of new ministries to the bi-monthly meetings of participants.

Proposed resolutions

A045 Celebrate and Support the Planting of New Episcopal Worshiping Communities

Resolved, That the 81st General Convention and the Episcopal Church continues churchwide support for the planting of new worshiping communities, the training and recruiting of church planters, and the fostering of a church-wide network of support for new missional development that was originally funded by GC2018-A005, GC2018-A032, and GC2018-A095; and be it further

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

Resolved, That the budget for sustaining this new ministry development will be \$1,692,000.00 for 2025-2027 to be allocated as follows:

- \$92,000.00 to identify and support existing programs to train clergy and lay leaders in planting congregations,
- \$200,000.00 to provide mentorship/coaching/training for planters of congregations,
- \$100,000.00 for the continuing development and implementation of a program to train bilingual/bi-cultural lay and ordained leaders in church planting for various cultural contexts,
- \$1,300,000.00 for grants to new and existing church plants, to be administered by the Advisory Group on Church Planting and Revitalization in consultation with the Churchwide Office Staff Officer for church planting; And be it further

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

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

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

Resolved, That the Presiding Bishop and President of the House of Deputies establish an Advisory Group on Church Planting and Revitalization of not more than twelve (12) people, consisting of those with experience in revitalizing congregations, diocesan oversight of such work, working with evangelism and mission, to carry out provisions of this resolution, including making recommendations to Executive Council about grants to be awarded, helping to identify potential revitalizers, and developing a network of coaches, and working with staff on training church revitalizers; and be it further

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

Resolved, That the Joint Budget Committee of Executive Council consider a budget allocation of \$1,692,000.00 for the implementation of this resolution.

A046 Support Starting New Bi-Cultural and Multi-Cultural Ministries

Resolved, That the 81st General Convention and the Episcopal Church celebrates and actively supports the work of our missionaries for Ethnic Ministries and the vital work they are doing to support bi-cultural and multicultural ministries; and be it further

Resolved, that in support of these new ministries taking place in existing congregations with partnership and support from that congregation where possible, the Church continues to follow the best practices identified by the Ethnic Ministry offices even as we continue to learn based on our experience and the work of our ecumenical partners; and be it further

Resolved, that the budget for development of sustainable congregational revitalization throughout the Church will be \$500,000 for 2024-2027 to be allocated as follows:

- \$350,000 for bi-cultural and multi-cultural ministry grants for that will include ministries in existing congregations with partnership and support from that congregation where possible, to be administered by the Advisory Group on Church Planting and Revitalization in consultation with the Churchwide Office Staff Officer for church planting. .
- \$100,000 to provide in support of churchwide gatherings for lay and ordained leaders doing this bi-cultural and multi-cultural ministry in their dioceses, and
- \$50,000 to provide mentorship/coaching/training for lay and ordained leaders engaged in bi-cultural and multi-cultural ministry.

Resolved, That the Presiding Bishop and President of the House of Deputies establish an Advisory Group on Church Planting and Revitalization of not more than twelve (12) people, consisting of those with experience in revitalizing congregations, diocesan oversight of such work, working with evangelism and mission, to carry out provisions of this resolution, including making recommendations to Executive Council about grants to be awarded, helping to identify potential revitalizers, and developing a network of coaches, and working with staff on training church revitalizers; and be it further

Resolved, That the Joint Budget Committee of Executive Council consider a budget allocation of \$500,000 for the implementation of this resolution.

A044 Develop Sustainable Congregational Revitalization Ministries

Resolved, That the 81st General Convention and the Episcopal Church celebrates and actively supports the revitalization of congregations, seeking not to restore past glories, but to move into the new callings of our loving, liberating, life-giving God; and be it further

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

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

Resolved, that the budget for development of sustainable congregational revitalization throughout the Church will be \$500,000 for 2024-2027 to be allocated as follows:

- \$100,000.00 to engage Bishops and the diocesan representative(s) they appoint in development of a framework for congregational revitalization, identifying roadblocks that regularly thwart this work and identifying resources that are proven to enhance this work;
- \$75,000.00 to engage clergy and lay leaders in gleaning learnings from congregational revitalization that they have successfully done and/or they have failed in attempts to do, identifying roadblocks that have thwarted their work and identifying resources that have enhanced their work;

- \$75,000.00 for translation services and to facilitate participation of Spanish-speaking lay and ordained leaders in training for congregational revitalization;
- \$75,000.00 for further development of five-phase congregational redevelopment strategy - (1) diagnosing/assessing resources and challenges, (2) discerning next calling, (3) connecting with local and diocesan partners, (4) iterating and continued resourcing, and (5) evaluating, refining and sustaining
- \$150,000.00 to support a team of local and regional church-wide office staff to oversee the work; and
- \$25,000.00 to provide mentorship/coaching/training for lay and ordained leaders in revitalization of their congregations;

And be it further

Resolved, That the Presiding Bishop and President of the House of Deputies establish an Advisory Group on Church Planting and Revitalization of not more than twelve (12) people, consisting of those with experience in revitalizing congregations, diocesan oversight of such work, working with evangelism and mission, to carry out provisions of this resolution, including making recommendations to Executive Council about grants to be awarded, helping to identify potential revitalizers, and developing a network of coaches, and working with staff on training church revitalizers; and be it further

Resolved, that the Joint Budget Committee of Executive Council consider a budget allocation of \$500,000.00 for the implementation of this resolution.

Continuance recommendation

We have accomplished several important tasks in the past decade, despite uneven support through the church wide budget, including the creation of an ongoing network of church planters, coaches, and Advisory Group members. We also developed an updated granting application process, a system for reviewing grants, and made recommendations to Executive Council on behalf of grantees. We recognize the focus of our grants continue to support New Episcopal Communities that include public worship as a component of their ministry, a component which provides community resiliency; this can be an ongoing conversation in the future. Given that the Advisory Group has had a far reaching and influential impact in implementing the terms of the resolutions, we recommend that some current members of the Advisory Group be seriously considered for future appointments to future task forces or advisory groups. We have experienced essential positive impact from members who had previous experience with this work. If it is possible, retaining eligible Advisory Group members in the new triennium will help this work continue and to do so in a timely fashion. Without the experience of members of the previous iteration of this group, we would not have been able to get the grant process underway as soon or to consider applications as effectively.

ASSESSMENT REVIEW COMMITTEE

Members

The Rev. Nancy Koonce, Chair	Idaho, VIII	2024
The Rev. Patty Downing	Delaware, III	2024
The Rt. Rev. Michael C. B. Hunn	Rio Grande, VII	2024
The Rt. Rev. Mark Lattime	Alaska, VIII	2024
The Rt. Rev. Jose' McLoughlin	Western North Carolina, IV	2024
Ms. Holli Powell Sturm	Lexington, IV	2024
The Rt. Rev. Gregory H. Rickel	Olympia, VIII	2024
Canon Rosalie S. Ballentine, Esq.	the Virgin Islands, II	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	
The Most Rev. Michael Bruce Curry, Ex Officio	North Carolina, IV	
Mr. N. Kurt Barnes, Treasurer	New York, II	
Mrs. Nancy Caparulo, Staff	Newark, II	

Acknowledgements

We would like to thank Mr. N. Kurt Barnes, Treasurer, for the assistance he has given in providing the needed information and explanations necessary for this Committee to operate effectively.

We would also like to thank Nancy Caparulo for her excellent and timely minutes.

Mandate

2015-FFM 074 Create Diocesan Assessment Review Committee

The following is a true copy of a Resolution adopted by the Executive Council at its meeting from January 9-11, 2015 at which a quorum was present and voting.

Resolved, That Executive Council, meeting in Linthicum Heights from January 9-11, 2015, approve the creation of a Diocesan Assessment Review Committee, under the oversight of the Joint Standing Committee Finances For Mission (FFM), to work with dioceses that do not commit to pay their full assessment to The Episcopal Church in any year, to talk with diocesan leaders about the reasons for not paying the full amount, including reviewing diocesan financial statements, and to encourage and work with such dioceses to create a plan for reaching the full assessment amount; and be it further

Resolved, That the Presiding Bishop and the President of the House of Deputies shall appoint the members of the Committee; and be it further

Resolved, That the Diocesan Assessment Review Committee have the authority to recommend that Executive Council grant a full or partial Waiver of Assessment to any diocese, allowing it to pay a lower assessment amount than levied in The Episcopal Church's budget, based on financial hardship, an appropriate plan for reaching the full assessment over time, or other factors; and be it further

Resolved, That Executive Council has the authority to consider the Diocesan Assessment Review Committee's recommendations and determine whether a Waiver of Assessment shall be granted; and be it further

Resolved, That any diocese that does not plan to pay its full assessment amount, and has not received a Waiver of Assessment be asked to account in writing to Executive Council and the wider church for that choice; and be it further

Resolved, That a diocese that does not pay its full assessment in any year, and has not received a Waiver of Assessment, shall not be eligible to receive any grants or loans from the Domestic and Foreign Missionary Society.

FFM is responsible for further practical details/refinement at the March meeting.

Summary of Work

The Assessment Review Committee met once by ZOOM since the last General Convention through August 31, 2023.

On January 1, 2019, assessments of dioceses to support the Episcopal Church budget became mandatory. The Assessment Review Committee began in the fall of 2016 to develop and publicize to the church the process for applications for assessment waivers. The first waivers were granted in October 2018 for the 2019 assessment year. Dioceses failing to commit to or pay their 2019 assessment were ineligible for DFMS grants or loans in 2020.

Waiver applications were posted on the finance Office webpage and the application process is completely on-line. An application, statement of financial hardship, current budget, diocesan report, and audit are required from each applicant. Executive Council adjusted deadlines between 2017 and 2020 as dioceses became familiar with the process. Beginning in 2021 and moving forward, the deadline for regular applications will be January 31 of the assessment year. Dioceses may apply anytime when beset by unforeseen financial hardship. Dioceses are ineligible for grants and loans in the year following a year when no waiver was granted or their payment of assessment was below the assessment total.

The goal of the committee was to build relationships with dioceses facing financial hardship by understanding their ministries and hearing stories of challenges and successes and to help develop financial security by focusing on partnership vs. punishment. In addition, the goal of General Convention in reducing the assessment over time was to make it possible for more dioceses to participate fully in the life of the Episcopal Church. The following chart shows the increased diocesan participation as the assessment percentage decreased and waivers became available:

Year	2015	2016	2017	2018	2019	2020	2021	2022	2023 as of 8/31/23
Asking/Assessment Percentage	19%	18%	16.50%	15%	15%	15%	15%	15%	15%
# Dioceses at Full Asking	47	56	61	74	88	90	96	93	103
# Diocese with Waiver	-	-	-	-	15	15	11	3	2

Report to the 81st General Convention

# Diocese not in Compliance	63	54	49	36	7	6	4	15	6
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The work of the Committee has clearly been successful as shown by the chart above.

No funds were expended by this Committee to do its work.

Since the waiver process is required by canon, The Assessment Review Committee should continue in the next triennium.

The Rev. Dcn. Nancy Wonderlich Koonce

Assessment Review Committee, Chair

EXECUTIVE COUNCIL COMMITTEE FOR INDIGENOUS BOARDING SCHOOLS AND ADVOCACY

Members

Dr. Carter "Blue" Clark, Convener	Oklahoma, VII	2027
Ms. Sarah Augustine, Member		2027
Vance Blackfox, Member		2027
Ms. Tracy Dallenbach, Member	Minnesota, VI	2027
The Rt. Rev. Jonathan Folts, Member	South Dakota, VI	2027
Ms. Carmine C. Goodhouse, Member	North Dakota, VI	2027
Ms. Ashley Hubbard, Member	Navajoland Area Mission, VIII	2027
Roth Puahala, Member	Hawaii, VIII	2027
Bobby Saunkeah, Member	Oklahoma, VII	2027
Mr. Newland F. Smith III, Member	Chicago, V	2027
The Rev. Rachel Taber-Hamilton, Member	Olympia, VIII	2027
Ms. Leora Tadgerson, Member	Northern Michigan, V	2027
Ms. Julia Ayala Harris, Presiding Officer	Oklahoma, VII	
The Most Rev. Michael Bruce Curry, Presiding Officer	North Carolina, IV	
The Rev. Dr. Bradley S. Hauff, Staff	Pennsylvania, III	

Mandate

Resolved, that on lands that were tended by the Taíno peoples, taken from them and renamed San Juan, Puerto Rico, the Executive Council of The Episcopal Church, meeting on April 20-23, 2022, acknowledges and mourns the devastation caused by Indigenous Boarding Schools during the 19th and 20th centuries and commits to investigate and tell whatever is true about The Episcopal Church’s involvement with these schools. Previous silence on this topic does not condone the cultural and religious genocide that occurred at these schools across the United States. To fully grapple with its history and any relationship it has to these atrocities, The Episcopal Church must bring together its stories, experiences, records, and documents, to its archives. The legacy of these schools must be acknowledged, understood, and learned from so that we can come to a full understanding of The Episcopal Church’s involvement and the schools’ religious and cultural impact. Even while the full story of the Indigenous Boarding Schools and their relationship to The Episcopal Church is as yet not clearly known, Executive Council recognizes and deeply regrets the hurt carried by Indigenous Episcopalians and grieves the ongoing legacies of these schools; and be it further

Resolved, that The Executive Council of The Episcopal Church grieves the unequal treatment Indigenous and Native Peoples have received when they have suffered harms that deserve attention and redress, and expresses its solidarity with the Indigenous and Native Peoples of the world and supports the rights of Indigenous and Native Peoples to equal treatment; and be it further *Resolved* that Executive Council create an Executive Council Committee for Indigenous Boarding

Schools and Advocacy as a Committee of Executive Council, charged with guiding and overseeing three initiatives:

- (1) the gathering of historical information about Indigenous Boarding Schools that had any relationship to The Episcopal Church, including information revealing the nature and extent of that relationship (the Gathering Initiative),
- (2) the curation of the gathered information in a collection, housed in the Archives of The Episcopal Church, that will tell the story of the Schools' relationship to the Church and their impacts on Indigenous Episcopalians, even until today (the Story Initiative), taking care to interweave the stories of Episcopal Indigenous boarding schools with the ongoing Native oppression and white supremacy, and
- (3) the development and implementation of a plan for gathering information and hearing stories about the varieties of ways that Indigenous and Native peoples are subjected to unequal treatment by the federal government, state governments, and other authorities, including information provided by the ongoing investigation by the U.S. Department of the Interior, and, in conjunction, the development of proposals for advocacy and other action responding to the issues identified (the Advocacy Initiative). The Advocacy Initiative shall include in its focus, but not be limited to, information and stories about missing and murdered Indigenous women, girls, and two-spirits whose deaths have not been investigated by authorities, as well as the lack of reporting and collecting of statistics on missing and murdered Native and Indigenous women, girls, and two-spirits; and be it further

Resolved, that in carrying out the Gathering Initiative and the Story Initiative, the Committee shall nominate to the Executive Committee of Executive Council (ECEC) one or more independent historians and other experts not connected to The Episcopal Church who, with the consent of the ECEC, shall be engaged to gather information, including by reviewing information contained in the Church's Archives and those of other Episcopal and non-Episcopal institutions, as well as by directly collecting and preserving the oral histories of Indigenous Episcopalian survivors and their families. In connection with any such nomination, the Committee shall also propose the scope of the anticipated work of the person nominated, which also shall be subject to the consent of the ECEC. Following engagement, the Committee shall make regular reports to the Executive Council on the progress of the work of any particular expert. The ECEC shall have authority for oversight of the investigative work, including termination of any expert. Scholarly independence of these investigators and experts is required to ensure the integrity of any conclusions reached, no matter how difficult those may be for the Church. The Committee will work with the expert(s) to develop questions to be considered in addition to those developed by the expert(s). The questions should include, at a minimum:

- (a) How many Boarding Schools were there with ties to The Episcopal Church?
- (b) How many students attended those Boarding Schools and how many may have been injured, were sick or died at the Boarding Schools far from their homes?

(d) How were the Episcopal Indigenous Boarding Schools funded and founded and by which institutions and individuals, including but not limited to diocesan leaders, clergy and lay leaders of The Episcopal Church, the Board of Missions, the UTO, and/or the Women's Auxiliary?

(h) Were missionaries assigned to schools, how many, and from which dioceses or institutions?

(i) Were there any inspections or reports concerning the schools?

(j) What is the current status of the schools?

(k) Did The Episcopal Church play any role in other denominations' schools; and be it further *Resolved*, that the Committee is encouraged to consult with other religious denominations to learn what similar efforts they may be making and explore whether collaboration in the development of these histories may be beneficial; and be it further

Resolved, that in carrying out the Story Initiative, the Committee will work closely with the Office of Indigenous Ministries and the Archives of The Episcopal Church in their development of collections related to Indigenous Boarding Schools, including the creation of resource guides, research documents, and intentionally gathered records and holdings regarding Indigenous Boarding Schools with any relationship to The Episcopal Church. This new Archives collection is intended to be the main repository for information about these long-defunct schools, including materials such as school records, fundraising materials, and wider church oversight records; and will be made available for online review and searching, as well as at the Archives building on the ancestral homelands of Jumanos, Tonkawa, Ndé Kónitsaąí Gokíyaa (Lipan Apache), Coahuiltecan, ~~Namunuu~~ (Comanche) taken from them and renamed Austin, Texas; and be it further

Resolved, that in carrying out the Advocacy Initiative, the Committee will work with the Office of Indigenous Ministries and the Office of Government Relations of The Episcopal Church in its development of proposals for advocacy and other action responding to the issues identified; and be it further

Resolved, that the Executive Council intends that the work of the Committee will aid in developing a justice-making healing process for Indigenous communities and creating a legacy to pass on to the next generations; and be it further

Resolved, that the Committee will include a total of 15 members and have a majority membership of Indigenous and Native Episcopalians. Membership shall include historians, storytellers, and trusted elders in the Indigenous communities with a diversity of tribal affiliations honoring the diversity of Indigenous Episcopalians. There will be at least one member who is also on the Native and Indigenous Ministries Council of Advice; and the Missioner for Indigenous Ministries shall act as Staff liaison; and be it further

Resolved, that the Committee shall report its findings regularly to the Executive Council Joint Standing Committee on Mission Within and the wider Church, and per the Executive Council Bylaw VIII.2.d, it will continue until the end of the 82nd General Convention, unless extended by the Executive Council; and be it further

Resolved, Executive Council urges dioceses to contribute their records to the Story Initiative, and to appoint their own Indigenous and Native ministry advocates so that this important work can continue throughout communities, counties, states, and commonwealths.

Summary of Work

Initial Meeting of the Committee

The committee met virtually on July 11, 2023. The Presiding Bishop and President of the House of Deputies were present. The following strategies for developing the committee's work were mutually clarified by the members as follows.

- The committee needs to meet in person prior to the end of the year with the GC A127 committee to examine the mandates of both resolutions and identify areas of focus for each committee and prioritize specific objectives on a timeframe. This meeting has been scheduled for October 25-28, 2023, in Seattle, WA, (Diocese of Olympia).
- The committee, along with the A127 committee, will consider the resolutions to be suggestions for focus and work rather than verbatim, literal mandates. It will be up to the committee members to interpret the resolutions and apply any action to them as deemed pertinent and realistic to the overall purpose of the resolutions. The Presiding Bishop and President of the House of Deputies concurred with this.
- Plans for the in-person meeting will be conveyed to the A127 committee at its first virtual meeting which is scheduled for July 20, 2023.
- Dr. Blue Clark has been appointed Convener of the group for the time being until a Chair (or Chairs) are selected from among the membership.

EXECUTIVE COUNCIL COMMITTEE ON ANTI-RACISM & RECONCILIATION

Members

Mr. James McKim, Chair	New Hampshire, I	2024
The Rev. Yamily Bass-Choate, Member	New York, II	2024
Ms. Deb Brewer-Cotlar, Member	Iowa, VI	2024
The Rev. Jairo Chiran Quiñonez, Member	Litoral Ecuador, IX	2024
The Rt. Rev. Gayle Harris, Member	Massachusetts, I	2024
The Rt. Rev. Scott Hayashi, Member	Utah, VIII	2024
The Rev. Charles Kerschen, Member	Western Kansas, VII	2024
The Rev. Cn. Christine McCloud, Member	Maryland, III	2024
The Rev. Malcolm McLaurin, Member	Olympia, VIII	2024
Ms. Felicity Thompson, Member	Michigan, V	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	

Representation at General Convention

Mr. James McKim, Bishop Gayle Harris, and Bishop Scott Hayashi will be representing us at General Convention and are authorized to receive non-substantive amendments to this Report at General Convention.

Acknowledgements

The Committee would like to acknowledge the contributions of Rev. Miguel Bustos, our liaison, to the Presiding Bishop’s Staff. His efforts to engage the members in the efforts of the Presiding Bishop’s Office for Evangelism, Reconciliation, and Creation Care was remarkable. Even though he went through a significant surgery in early August, he still managed to be a great help in identifying people with whom we could collaborate on the resolutions which are included in this Blue Book Report.

Thanks to Christopher Hayes, Esq. Of the Constitution and Canon for providing guidance on our resolution regarding amending the Canon to use the language approved by the Church in 2018 around dismantling racism and achieving racial justice and healing.

Thanks, also, to Mr. Ryan Kusumoto of the Constituting Group for the Episcopal Coalition for Racial Equity and Justice for his thought leadership on the long-term structures necessary to carry the work of dismantling racism and achieving racial justice and healing forward.

Mandate

2022 - A052 Revise the Mandate of the Executive Council Committee on Anti-Racism and Reconciliation

Resolved, That the mandate for the Executive Council Committee on Anti-Racism & Reconciliation is hereby clarified as follows:

“This Committee is charged with supporting and monitoring the Church’s work in response to General Convention resolutions directed at dismantling racism and promoting racial healing, justice, and reconciliation in the Church by:

- a) helping the church recognize and develop its work of racial healing, justice, and reconciliation as a fundamental and requisite part of Christian formation;
- b) supporting the work of Becoming Beloved Community: The Episcopal Church’s Long-Term Commitment to Racial Healing, Justice, and Reconciliation and other such initiatives the Presiding Officers, Executive Council, or Interim Bodies develop, and also the work of the Episcopal Coalition for Racial Equity and Justice;
- c) recommending, in collaboration with staff and other church organizations, resources and best practices for dismantling racism and for promoting racial healing, justice, and reconciliation that can be adapted to different contexts;
- d) collecting information from dioceses and provinces about their successes and challenges in complying with the canonical requirements and with General Convention Resolution 2018-A045 for providing anti-racism training;
- e) and sharing their findings with Executive Council on an annual basis.

Membership of the Executive Council Committee on Anti-Racism & Reconciliation shall be composed of:

one person named by the governing body of each province of this Church who has been trained in doing the work of dismantling racism and seeking to foster racial healing, justice, and reconciliation, has demonstrated experience in anti-racism/racial reconciliation work, has demonstrated the ability to make connections with people in their geographic area who do this work, and has demonstrated a commitment to make connections with people in the provinces who do this work;

one member of the Executive Council as appointed by the Chair and Vice-Chair of Executive Council;

one Bishop as appointed by the Presiding Officers;

members named who are from the racial or ethnic groups of black, Latino/a, Asian, Native American/Indigenous, and non-Hispanic white to ensure representation of diverse racial and ethnic voices on this Committee - if there are none, then the Chair and Vice-Chair of Executive Council shall appoint a member at large from each unrepresented racial or ethnic group;

a member named who is under 40, to ensure representation of multiple generations - if there are no members then the Chair and Vice-Chair of Executive Council shall appoint a member at large from each unrepresented generational group.

Members shall serve terms as follows:

Each Committee member shall serve one triennium beginning January 1 in the year following each General Convention until the December 31 following the next General Convention. Members may be named to serve consecutive terms by their provinces.

In the event that a province fails to name a person to serve on the Committee by [sic] January 1, when each term begins, the Chair and Vice-Chair of Executive Council shall appoint a qualified person from that province to serve on the Committee.

Vacancies shall be filled in the same manner as the original members were named. Vacancies in excess of 30 days shall be filled by the Chair and Vice-Chair of Executive Council, and in the case of a Bishop vacancy, by the Chair of Executive Council.”

Summary of Work

To many, discussions about race seem to have become less civilized over the year since our last General Convention. While we have not returned to the physical lynchings of the past, there has seemed to be an increase in murders of innocent people of color by law enforcement. We have seen an increase in verbal abuse – in person and online. We have seen outright denial of the needs and dignity of people of color even in legislative bodies across the land where so-called “Divisive Concepts” and “Banned Books” have been passed. The usurping of the term “WOKE” has left many scratching their heads as to how we can ever come together and live in harmony.

As to be expected, the short time period between General Conventions made it challenging to get work accomplished. For ECCAR there was an additional challenge in that while other Interim Bodies were constituted at the end of 2022, our members were not confirmed named until February 2023. While it took the expected few months for us to officially come together, the Committee was able to fulfill much of its mandate.

We met once a month - eight (8) times in all. All meetings were over Zoom. Most were at 4:30 Eastern time as that seemed to be best for the majority of members. We provided translation in Spanish for all our agendas, meetings, and minutes.

During our discussions, it became clear that the short timeframe for our work would not allow us to continue the work from the previous triennium of:

- communicating with seminaries about their preparing students for the work of racial reconciliation
- developing guidance on Recruitment/Hiring/Retention of people of color within the Church
- better understanding Church demographics
- Creating supplements to the Framework for Anti-Racism/Reconciliation Training that would address the nuances of delivering training to different races.

We decided to focus on crafting resolutions for the upcoming General Convention and this Blue Book Report. Below is a breakdown of our work according to our mandate.

a) Helping the church recognize and develop its work of racial healing, justice, and reconciliation as a fundamental and requisite part of Christian formation

Members of the Committee provided input to Rev. Miguel Bustos regarding the work of the Presiding Bishop's staff. We highlighted important announcements from the Presiding Bishop's staff back to our provinces.

b) Supporting the work of Becoming Beloved Community: The Episcopal Church's Long-Term Commitment to Racial Healing, Justice, and Reconciliation and other such initiatives the Presiding Officers, Executive Council, or Interim Bodies develop, and also the work of the Episcopal Coalition for Racial Equity and Justice

Members of the Committee advertised the July 9 – 12, 2023 *It's All About Love Conference* within our provinces.

c) Recommending, in collaboration with staff and other church organizations, resources and best practices for dismantling racism and for promoting racial healing, justice, and reconciliation that can be adapted to different contexts

Rev. Charles Kerschen worked with the Operations and Communications staff of the Church to ensure that Racial Reconciliation material on the episcopalchurch.org website was translated into least Spanish.

Members of the Committee participated in discussions at the Absalom Jones Center for Racial Healing.

d) Collecting information from dioceses and provinces about their successes and challenges in complying with the canonical requirements and with General Convention Resolution 2018-A045 for providing anti-racism training

Members of the Committee spread the word about responding to the Racial Justice Audit put forth by the Presiding Bishop's Staff to capture this kind of information. The Racial Justice Audit is usually published on the Episcopalchurch.org site's pages on the racial reconciliation ministry (<https://www.episcopalchurch.org/ministries/racial-reconciliation/>)

Proposed Resolutions

Resolution A027: Increase recruitment, hiring, appointment, retention, and representation of People of Color in church positions

Resolved, That the 81st General Convention of The Episcopal Church ("TEC") hereby commit to developing greater representation and retention of PoC in all church positions; and be it further

Resolved, That the 81st General Convention urges TEC staff in the Office of Racial Justice and Reconciliation, in partnership with the Executive Council Committee on Anti-Racism & Reconciliation and others, to complete the development of and dissemination of a set of guidelines and best practices to all parishes, dioceses, and institutions for the recruitment, hiring, appointment, retention, and representation of People of Color in hired and appointed church positions; and be it further

Resolved, That TEC strongly urges all parishes, dioceses, and institutions to follow these guidelines and best practices reporting the results of their efforts through the annual parochial report.

EXPLANATION:

Recent research into the membership of the church has confirmed that there is a significant percentage of our membership who are People of Color. Yet People of Color are not equitably represented in the governance and operations of the church. In the Sermon on the Mount Jesus gives us what is commonly known as The Golden Rule "Do unto others as you would have them do unto you". This is repeated in both Matthew 7:12 and Luke 6:31. Yet as a church, how can we do this if we as a church do not have appropriate visibility and representation in the leadership and operations of the church that would lead us to an understanding of ourselves?

While there is a desire to rectify this situation and have equitable representation of People of Color, research also indicates that many members involved in calling or hiring for church positions do not know how to reach People of Color or truly engage them in candidacy for positions.

While the Transition office has some guidelines, they are not as robust enough and those existing guidelines only apply to clergy transitions.

This resolution will provide the guidance necessary to help increase the numbers of People of Color toward a more appropriate representation in the church. It should, also, lead to more involvement and more membership of People of Color in the church.

Resolution A031: Translate Reconciliation Resources into Spanish.

Resolved, That this 81th General Convention of The Episcopal Church (“TEC”) hereby strongly encourages Language Coordinator Services work with the Office of Ethnic Ministries, the Office of Racial Reconciliation, and the Executive Council Committee on Anti-Racism & Reconciliation to translate key racial reconciliation resources into Spanish that will further the Church’s efforts toward dismantling racism and achieving racial justice and healing; and be it further

Resolved, That the sum of \$50,000 be set aside for carrying out this work which is figured on a per-word basis.

EXPLANATION

1 Corinthians 14:9-13 says:

“9 So with yourselves, if with your tongue you utter speech that is not intelligible, how will anyone know what is said? For you will be speaking into the air. 10 There are doubtless many different languages in the world, and none is without meaning, 11 but if I do not know the meaning of the language, I will be a foreigner to the speaker and the speaker a foreigner to me. 12 So with yourselves, since you are eager for manifestations of the Spirit, strive to excel in building up the church. 13 Therefore, one who speaks in a tongue should pray that he may interpret.”

Why, indeed, should the Church speak to those for whom English is not their first language how will they know what we have said? How can we be one Church? As the passage says, we are called to interpret what we say.

Since English and Spanish are the most widely used languages without any doubt, their translations are incredibly crucial to the life of the Church. General Convention Resolution 1988-A035 Encourage Spanish-speaking Provinces to Translate Church Documents encouraged Spanish-speaking Provinces to Translate Church Documents. This has been found insufficient and unfair by the Church. Several General Convention Resolutions (including 2018-A070 Create New Translations of the 1979 Book of Common Prayer and 2018-C024 Propose a Process for Liturgical Translations) were passed with the aim of translating various liturgical resources into Spanish. Some of this has been accomplished. However, discussions with staff at Church Headquarters have revealed that funding is insufficient to complete these translations and that none of them provide funding to translate resources around dismantling racism and achieving racial justice and healing. This resolution asks that the Church stay true to God’s teachings and its commitment to translating key documents with a focus on those related to racial reconciliation so that the whole Church can do the critical work of dismantling racism and achieving racial justice and healing.

Resolution A032: Hire a Chief Equity Officer

Resolved, That the 81st General Convention of The Episcopal Church (“TEC”) hereby acknowledge that the work of dismantling racism and achieving racial justice and healing toward racial reconciliation is equity work requiring a constant focus regardless of who is in leadership positions of the Church; and be it further

Resolved, That TEC hire a Chief Equity Officer to assist in the establishment of greater representation and retention of PoC in all church positions and advise church leadership on equitable operational practices; and be it further

Resolved, That this Chief Equity Officer report to the Presiding Bishop; and be it further

Resolved, That TEC compensate this Chief Equity Officer on par with the compensation for Chief Equity Officers of organizations of similar size.

EXPLANATION:

In an era marked by increasing globalization, social awareness, and recognition of the intrinsic value of diversity, it is imperative that organizations reflect these principles in their leadership structure and operational strategies. The Episcopal Church, as a prominent institution with a rich history and significant influence, should proactively address the pressing need to promote diversity, equity, and inclusion within its ranks. To achieve this goal, hiring a Chief Equity Officer (CEO) is not just a forward-thinking move; it's a strategic necessity for several compelling reasons.

The proposal is for a Chief Equity Officer rather than just a Chief Diversity Officer to reflect the learning that diversity itself is not the goal and in and of itself is not sufficient. Equitable treatment and outcomes across diversity is the goal.

Upholding Christian Values of Love and Inclusivity:

Central to the teachings of the Episcopal Church is the message of love, compassion, and inclusivity that Christ exemplified. A CEO would play a pivotal role in ensuring that these core values are not only preached but also genuinely practiced within the Church's operations, policies, and interactions. This alignment between values and actions would resonate strongly with the Church's members and the wider community, fostering a more vibrant and welcoming spiritual community.

Sending a Significant Signal:

Having a Chief Diversity Officer reporting to the head of the organization sends a signal to those inside and outside the church that TEC believes and practices the commitment to respect the dignity of every human being as described in the Baptismal Covenant.

Reflecting the Congregations and Society We Serve:

As a diverse body of believers with a presence across different communities and regions, the Episcopal Church has a responsibility to be reflective of the varied backgrounds and experiences of its congregants. By hiring a CDO, the Church can ensure that its leadership composition better mirrors

the diversity it serves, thereby making it more relatable and accessible to all members. This approach enhances credibility and fosters a sense of belonging among all parishioners.

Addressing Systemic Inequities:

The presence of a CDO can help the Episcopal Church identify and address historical and systemic inequities that might exist within its structure. By conducting thorough assessments, implementing tailored diversity initiatives, and monitoring progress, the CDO can help dismantle barriers that hinder full participation and representation of marginalized groups within the Church. This commitment to rectifying past wrongs aligns with the principles of justice and reconciliation.

Driving the Work:

Best practices in successful anti-racism and diversity initiatives call for the assignment of someone to drive efforts on a daily basis rather than assuming that everyone will see the work as a priority compared to all their other daily work. This resolution provides for someone who will ensure a daily focus at the highest levels that signify that the work is of the highest priority.

Enhancing Decision-Making and Innovation:

Diversity has consistently fostered creativity, innovation, and more effective decision-making. When a wide range of perspectives, experiences, and voices are considered, the outcomes are richer and more well-rounded. A CDO can guide the Church in embracing this diversity-driven approach to strategic planning, program development, and problem-solving, leading to better outcomes and a more adaptable organization.

Responding to Contemporary Challenges:

In a rapidly evolving world, issues related to diversity and inclusivity are at the forefront of societal discourse. By appointing a CDO, the Episcopal Church demonstrates its willingness to engage with these issues thoughtfully and proactively. This not only aligns with the Church's commitment to social justice but also positions it as a thought leader who can contribute constructively to broader conversations on these topics.

Strengthening Outreach and Evangelism:

A diverse leadership team, championed by a CDO, can significantly impact outreach efforts. Diverse leadership reflects the diverse world we live in, making the Church's message more relatable and its outreach efforts more effective. A CDO can offer insights into how different communities perceive the Church, helping tailor messages and approaches to resonate with a broader audience.

Conclusion:

In a time when diversity, equity, and inclusion are not just aspirational goals but essential components of a just and thriving society, the Episcopal Church must take a leading role. Hiring a Chief Diversity Officer is a strategic investment that aligns with the Church's values, enriches its leadership, and positions it as a beacon of inclusivity in a world hungry for meaningful connections and genuine

acceptance. By taking this step, the Episcopal Church reaffirms its commitment to walking the path of love and unity that Christ exemplified.

Resolution A033: Renew ECCAR

Resolved, That the 81st General Convention of The Episcopal Church (“TEC”) reaffirm the importance of the work of the Executive Council Committee on Anti-Racism and Reconciliation (ECCAR) to support the Church to live into existing General Convention resolutions starting with the 70th General Convention toward becoming a church committed to ending institutional and other forms of racism which necessitate the acceptance of abandonment of privilege and the sharing of power within our polity, within our society, and throughout the world; and be it further; and be it further

Resolved, That the Episcopal Church recognizes that the work of dismantling racism and achieving racial justice and healing has made progress in improving the awareness of the sin of racism in the Church and that the work of dismantling racism and achieving racial justice and healing is far from completed; and be it further

Resolved, That the 81st General Convention of The Episcopal Church recognizes no entity of the Church has been identified to carry on the efforts currently in the mandate of Executive Council Committee on Anti-Racism and Reconciliation; and be it further

Resolved, That the 81st General Convention of The Episcopal Church continue the existence of the Executive Council Committee on Anti-Racism & Reconciliation for another nine years.

EXPLANATION

General Convention Resolution 2015-A023, Authorized Continuation of the Executive Council Committee on Anti-Racism & Reconciliation through 2023. The time limit was put in place in the hopes that the Church would have established a permanent entity or role to institutionalize the work of dismantling racism and achieving racial justice and healing. While groups such as the Consulting Group for the Episcopal Coalition for Racial Equity & Justice, the Task Force on Redefining Social Justice, and the Presiding Officers’ Advisory Group on Beloved Community are working toward such a permanent focus for the Church, discussions with the leaders of those Committees have brought us to the agreed-upon conclusion that none have yet crystallized to a point the Committee feels is sufficient to truly carry out the work the Executive Council Committee on Anti-Racism & Reconciliation has been mandated to perform. This resolution would continue the Committee and the work providing other entities more time to complete their work while maintaining a focus on the work identified in the Executive Council Committee on Anti-Racism & Reconciliation mandate.

The Committee is pleased that Presiding Bishop Curry made racial reconciliation one of the three main foci of his Episcopate. With his term ending, the Committee wishes to ensure the work of racial reconciliation remains a major focus for the Church regardless of the priorities of the incoming Presiding Bishop.

Resolution A034: Promoting Equitable Formation for Future Church Leaders through Dismantling Racism and Achieving Racial Justice and Healing Education in Seminaries and Schools of Theological Education

Resolved, That the 81st General Convention of The Episcopal Church (“TEC”) recognize that the formation of future church leaders through seminary and schools of theological education holds immense potential to create lasting change in promoting justice, inclusion, and healing; and be it further

Resolved, That TEC strongly urge all Episcopal seminaries and schools of theological education to incorporate dismantling racism and achieving racial justice and healing education into their curricula based on tenants passed by the Church in resolution 2018-A044 Set Essential Components of Anti-Racism and Racial Reconciliation Training and described in the Framework for Anti-Racism and Reconciliation Training; and be it further

Resolved, That TEC urge that seminaries and schools of theological education regularly assess and review the effectiveness of their dismantling racism and achieving racial justice and healing education programs and provide annual reports to the Episcopal Church indicating progress, challenges, and adjustments made to enhance the impact of the training; and be it further

Resolved, That TEC encourage dioceses and provinces to support their seminaries and schools of theological education in implementing dismantling racism and achieving racial justice and healing education; and be it further

Resolved, That All Episcopal seminaries and schools of theological education are strongly encouraged to integrate the required dismantling racism and achieving racial justice and healing education into their curricula within the next academic year following the adoption of this resolution; and be it further

Resolved, That TEC institute a requirement for certification of seminaries and schools of theological education that the institution provide education on dismantling racism and achieving racial justice and healing set forth by the Church in resolution 2018-A044 Set Essential Components of Anti-Racism and Racial Reconciliation Training and described in the Framework for Anti-Racism and Reconciliation Training.

EXPLANATION

Acknowledging the profound and urgent need to address systemic racism and promote dismantling racism and achieving racial justice and healing within the Episcopal Church and the wider society, we recognize that the formation of future church leaders holds immense potential to create lasting change. As a Church, we are called to embody the teachings of Christ by promoting justice, inclusion, and healing. To further these goals, we propose the implementation of dismantling racism and achieving racial justice and healing training as a requirement in seminaries and schools of theological education.

We request the Presiding Bishop and the President of the House of Deputies to establish a task force comprising theological educators, experts in anti-racism work, and representatives from diverse communities within the Church. This task force will collaborate with seminaries and schools of theological education to develop comprehensive dismantling racism and achieving racial justice and healing curricula that are theologically sound, contextually relevant, and culturally sensitive.

We urge seminaries and schools of theological education to regularly assess and review the effectiveness of their dismantling racism and achieving racial justice and healing training programs. Seminaries and schools of theological education shall provide annual reports to the Episcopal Church indicating progress, challenges, and adjustments made to enhance the impact of the training.

We encourage dioceses and provinces to support their seminaries and schools of theological education in implementing dismantling racism and achieving racial justice and healing training. Dioceses are encouraged to allocate resources, both financial and human, to aid in the development and sustained execution of these programs.

Reporting and Sharing Best Practices

We request the task force established in Section 2 to compile and share best practices, resources, and case studies related to dismantling racism and achieving racial justice and healing training. This information shall be disseminated through official Episcopal Church channels to facilitate learning and collaboration among seminaries and schools of theological education and dioceses.

Implementation Timeline

All Episcopal seminaries and schools of theological education are strongly encouraged to integrate the required dismantling racism and achieving racial justice and healing training into their curricula within the next academic year following the adoption of this resolution.

We affirm our commitment to eradicating racism within the Episcopal Church and beyond. By requiring dismantling racism and achieving racial justice and healing training in seminaries and schools of theological education, we reaffirm our dedication to nurturing clergy and lay leaders who are equipped to lead with compassion, justice, and an unwavering commitment to dismantling systemic racism.

Resolution A035: Establish Model Policies for Anti/Racism/Racial Reconciliation Work

Resolved, That the 81st General Convention of The Episcopal Church (“TEC”) recommit itself to the work of the Church as articulated first in the 70th General Convention in Resolution D-113 which called the Church to address racism inside our church, within society, and in our world; and be it further

Resolved, That TEC acknowledge that the times and circumstances demand that the Church better articulate a clear and firm commitment to Dismantling Racism, Racial Healing, and Justice and

Reconciliation in a manner similar to how the Church addresses the protection of children and youth (commonly referred to as “Safe Church”); and be it further

Resolved, That the Presiding Bishop and the President of the House of Deputies, not later than March 1, 2025, jointly appoint a Special Task Group of five to seven persons with experience in the use and development of Model Policies for Racial Reconciliation and Healing to create a set of Model Policies for Dismantling Racism, Racial Reconciliation, and Healing that addresses the following:

- A screening and selection process for all clergy, lay employees, and lay leaders that requires training on racial reconciliation according to the Church’s teachings
- The articulation of behavioral standards for clergy, lay employees, and lay volunteers considering:
 - a. The prohibition of offensive language or actions to people of color
 - b. The prohibition of any racially derogatory materials (magazines, cards, videos, films, clothing, etc.) on the Church premises or at Church events
- Education and training for all clergy, lay employees, and lay leaders considering:
 - a. Training be completed every 3 years to keep knowledge and skills top of mind.
 - b. Specialized training for those who recruit, screen, or select persons to leadership positions
 - c. A mechanism to certify that clergy and lay leaders have the knowledge specified at least at the Awareness level specified by the Framework for Anti-Racism/Reconciliation Training document as approved by the Church in Resolution 2018-A044
 - d. Criteria for the certification of Seminaries and schools of theological education that ensures they provide training specified at least at the Awareness level specified by the Framework for Anti-Racism/Reconciliation Training document as approved by the Church in Resolution 2018-A044
 - e. Guidelines for delivering anti-racism/reconciliation training to different racial audiences as begun by the Executive Council Committee on Anti-Racism and Reconciliation as supplements to the Framework for Anti-Racism & Reconciliation Training - engaging the Office of Ethnic Ministries to develop Ethnic-oriented Supplements to the Framework for Anti-Racism Training
- Making the current Racial Justice Audit a permanent effort
- Identification of a diocesan Racial Reconciliation Officer who will track and possibly coordinate racial reconciliation efforts across the diocese
- Guidelines for accountability describing consequences when responding to concerns of:
 - a. Discriminatory behavior toward people of color
 - b. Lack of adherence to existing racial reconciliation resolutions; and be it further;

and be it further

Resolved, That the creation of these Model Policies for Racial Reconciliation and Healing be completed by September 31, 2025; and be it further

Resolved, That the Model Policies for Racial Reconciliation and Healing be promulgated after they are approved by the Special Task Group; and be it further

Resolved, That the Episcopal Church Center appoint a knowledgeable person to serve as a point of contact for dioceses to obtain information about complying with the Model Policies for Racial Reconciliation and Healing; and be it further

Resolved, That not later than June 30, 2026, Guidelines for Racial Reconciliation and Healing be created by each diocese to conform to the Model Policies for Racial Reconciliation and Healing with due regard to applicable local laws on the subject matters of the Model Policies for Racial Reconciliation and Healing; and be it further

Resolved, That all dioceses annually confirm, in writing or by email or through a survey mechanism, to a designated office in the Episcopal Church Center, that the diocese's Guidelines conform to the Model Policies for Racial Reconciliation and Healing.

EXPLANATION

Church-wide work toward racial healing begun in the 70th General Convention in Resolution D-113 has seen several resolutions at subsequent General Convention resolutions affirming the work and encouraging training of all leaders, ordained and lay. Data gathered by ECCAR as part of its mandate and by the Presiding Bishop's staff in the form of the Racial Justice Audit have found many entities within the Church doing this work. But it has, also, found many not living into those resolutions.

Knowledge and capabilities around racial reconciliation should be as important as knowledge and capabilities around the Protection of Children and Youth (commonly referred to as “Safe Church”). If the Church is really serious about eliminating racism and healing, we should not allow anyone to be appointed or elected to a position in the Church without having the knowledge agreed upon as the Church’s teachings as described in Resolution 2018-A044 Set Essential Components of Anti-Racism or Racial Reconciliation Training. Many of the Church’s leaders such as Catherine Meeks from the Absalom Jones Episcopal Center for Racial Healing are frustrated by the lack of accountability for adhering to the many resolutions that have already been passed but have not been lived into. This resolution would put structure to the call for the entire church to live into these resolutions thus building the capacity of the church to truly dismantle racism and bring healing to the world. This resolution is modeled after resolutions 2003-B008 Protect Children and Youth from Abuse and 2015-A073 Update Model Policies for Protection of Children and Youth and would help hold the Church accountable for the work we have said over and over again we wish to do.

The Church has broadened its focus beyond just anti-racism to racial reconciliation as described in Resolution [2018-B004](#) Urge Common Terminology to Describe Anti-Racism Work. This resolution moves the Church toward that broader focus.

Clergy are trained at seminaries across the country. Most seminaries have not provided sufficient training on dismantling racism, racial reconciliation, justice, and healing. Thus many clergy do not start their careers with the knowledge they need to have to support this work. This resolution would set a minimum standard for racial reconciliation training provided by seminaries at which clergy are educated.

The Episcopal Church Canon Article III requires that clergy must complete what is considered the Church's "training on anti-racism". This means one could claim that simply by watching a half-hour online video about racism they have met this requirement. Experts in this work agree that this "one and done" approach is not sufficient to move the church forward in dismantling racism and achieving racial justice and healing. This resolution addresses this issue by requiring that the required training be more comprehensive and that training should be repeated every 3 years to maintain an appropriate level of knowledge.

The Episcopal Church Canon Article III applies only to clergy. But as identified in multiple General Convention resolutions such as 2000-B049 Require Anti-Racism Training, 2018-A045 Reaffirm and Report on Anti-Racism Training, and 2018-A015 Direct Interim Bodies to Undergo Anti-Racism Training we also need all lay leaders to have the knowledge of the Church's training on anti-racism and racial reconciliation toward dismantling racism and achieving racial justice and healing, especially those at the parish level, if we are to truly make progress. This resolution would make that requirement apply not only to clergy but also to lay leaders across the Church.

Resolution A036: Amend Canons to Use Approved Common Terminology to Describe Anti-Racism Work

Resolved, That the 81st General Convention of The Episcopal Church ("TEC") acknowledge the expansion of its focus beyond anti-racism to racial reconciliation as confirmed in resolution 2018-B004 Urge Common Terminology to Describe Anti-Racism Work; and be it further

Resolved, That Canon Title III.6.5 .g.4 be amended to read as follows and voted on at the 81st General Convention:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

4. the Church's teaching on dismantling racism and achieving racial justice and healing;

<Proposed amended resolution text showing exact changes being made:>

4. the Church's teaching on ~~racism~~ *dismantling racism and achieving racial justice and healing*;

And be it further

Resolved, That Canon III.7.11.a.2 be amended to read as follows and voted on at the 81st General Convention:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

2. Evidence of appropriate background checks, certifications and proof of completion of applicable trainings including abuse prevention and dismantling racism and achieving racial justice and healing trainings;

<Proposed amended resolution text showing exact changes being made:>

2. Evidence of appropriate background checks, certifications and proof of completion of applicable trainings including abuse prevention and ~~anti-racism~~ *dismantling racism and achieving racial justice and healing* trainings;

And be it further

Resolved, That Canon III.8.5.h.4 be amended to read as follows and voted on at the 81st General Convention:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

4. the Church's teaching on dismantling racism and achieving racial justice and healing;

<Proposed amended resolution text showing exact changes being made:>

4. the Church's teaching on ~~racism~~ *dismantling racism and achieving racial justice and healing*;

And be it further

Resolved, That Canon III.9.13.a.2 be amended to read as follows and voted on at the 81st General Convention:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

2. Evidence of appropriate background checks, certifications and proof of completion of applicable trainings including abuse prevention and dismantling racism and achieving racial justice and healing trainings;

<Proposed amended resolution text showing exact changes being made:>

2. Evidence of appropriate background checks, certifications and proof of completion of applicable trainings including abuse prevention and ~~anti-racism~~ *dismantling racism and achieving racial justice and healing* trainings;

And be it further

Resolved, That Canon III.10.1.c.4 be amended to read as follows and voted on at the 81st General Convention:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

4. training regarding the Church's teaching on dismantling racism and achieving racial justice and healing;

<Proposed amended resolution text showing exact changes being made:>

4. training regarding the Church's teaching on ~~racism~~ *dismantling racism and achieving racial justice and healing*;

And be it further

Resolved, That Canon III.12.8.a.2 be amended to read as follows and voted on at the 81st General Convention:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

2. Evidence of appropriate background checks, certifications and proof of completion of applicable trainings including abuse prevention and dismantling racism and achieving racial justice and healing trainings;

<Proposed amended resolution text showing exact changes being made:>

2. Evidence of appropriate background checks, certifications and proof of completion of applicable trainings including abuse prevention and ~~anti-racism~~ *dismantling racism and achieving racial justice and healing* trainings;

EXPLANATION

In 2018, the Episcopal Church made a significant shift in its language and approach to address issues of racial justice and equality. This change involved moving from the use of the term "anti-racism" to the term "dismantling racism and achieving racial justice and healing" as outlined in resolution 2018-B004 Urge Common Terminology to Describe Anti-Racism passed at the General Convention of the Episcopal Church and the Episcopate of Bishop Michael Curry. This shift reflects a nuanced evolution in the understanding of addressing racial inequalities and promoting inclusivity within the context of the church and society as a whole. Our Canons need to reflect this change as a way to make it widely known that the Church is committed to living into this broader work.

Resolution [2018-B004](#) recognizes that the term "anti-racism" has been widely used to describe efforts aimed at dismantling systemic racism and prejudice. However, it was recognized that the term could sometimes carry connotations of opposition or confrontation, which might not fully capture the holistic and transformative nature of the work needed to address racial disparities.

The adoption of the term "dismantling racism and achieving racial justice and healing" signifies a broader and more encompassing approach to addressing racial issues. "Dismantling racism and achieving racial justice and healing" implies not just combating racism, but actively working towards healing, understanding, and creating a sense of unity among diverse communities. This approach acknowledges the painful history of racial oppression and seeks to engage in a process of acknowledgment, repentance, forgiveness, and healing.

The shift to the term "dismantling racism and achieving racial justice and healing" also aligns with the Episcopal Church's understanding of its mission and values. The church sees itself as a community of faith that is called to promote justice, compassion, and reconciliation in the world. By using the term "reconciliation," the church underscores its commitment to fostering mutual understanding, dialogue, and collaboration among individuals and communities that have been historically divided by racial disparities.

Resolution [2018-B004](#) signifies the Episcopal Church's desire to move beyond surface-level activism and confront the deeper roots of racial injustice. The adoption of the term "dismantling racism and achieving racial justice and healing" highlights the church's dedication to addressing historical injustices, promoting healing, and building relationships of trust and respect among all its members.

It is worth noting that this change in terminology does not negate the importance of actively opposing racism. Instead, it emphasizes that the work of addressing racial disparities involves more than just opposing racism; it entails fostering genuine relationships, acknowledging shared humanity, and seeking common ground for the sake of a more just and inclusive society.

Supplementary Materials

See the Racial Justice Audit usually published on the Episcopalchurch.org site's pages on the racial reconciliation ministry (<https://www.episcopalchurch.org/ministries/racial-reconciliation/>)

EXECUTIVE COUNCIL COMMITTEE ON CORPORATE SOCIAL RESPONSIBILITY

Members

Ms. Sarah Lawton, Chair	California, VII	2024
The Rev. Canon Brian Grieves, Vice-Chair	Hawaii, VIII	2024
Ms. Janet Brown	California, VII	2024
The Rev. Richard Burnett	Southern Ohio, V	2024
The Rt. Rev. Douglas Fisher	Western Massachusetts, I	2024
Chancellor Lawrence Hitt, II	Colorado, VI	2024
Ms. Diane Polard	New York, II	2024
The Rev. Kirsten Spalding	California, VIII	2024
The Rt. Rev. John Harvey Taylor	Los Angeles, VIII	2024
The Rev. Winnie Varghese	New York, II	2024
The Rev. Diana Wilcox	Newark, II	2024
Ms. Julia Ayala Harris	Oklahoma VII	2024
The Most Rev. Michael Curry	North Carolina, IV	2024

Changes in Membership

This term for this CCSR runs from January 2023 through December 2024, reflecting the corporate engagement year. Part of this report reflects the work carried out by the previous committee between 2021 and 2023:

The Rt. Rev. Douglas Fisher, Chair,	Western Massachusetts, I
The Rev. Canon Brian Grieves, Vice-Chair,	Hawaii, VIII
Mr. Casey Clark,	New York, II
The Very Rev. Mark Goodman,	Rio Grande, VII
Mr. Paul Neuhauser,	Iowa, VI
Ms. Diane Pollard,	New York, II
The Hon. Byron Rushing,	Massachusetts, I
The Rev. Kirsten Spalding,	California, VIII
The Rt. Rev. John Harvey Taylor,	Los Angeles, VIII
The Rev. Gay Clark Jennings, Ex-Officio,	Ohio, V
The Most Rev. Michael Curry, Ex Officio,	North Carolina, IV

Meetings

Since the committee's last Blue Book report, CCSR has met several times via Zoom:

June 10, 2021, September 16, 2021; March 8, 2022; June 30, 2022; and September of 2022 (the former committee).

The newly formed committee met via Zoom on January 30, 2023, September 13, 2023, and September 26, 2023. The newly formed committee also had the opportunity to meet in person in Cleveland, Ohio from March 25-27, 2023, and we used that time to introduce new members to this work and to provide an overview of our work in progress.

Representation at General Convention

Deputy Sarah Lawton and Bishop Douglas Fisher are authorized to receive non-substantive amendments to this Report at the General Convention.

Acknowledgements

The committee is indebted to Mercy Investment Services for its consulting expertise led by Ms. Pat Zerega and Mary Minette. At this time, we would like to congratulate Ms. Zerega on her retirement in the Fall of 2023 and to welcome Ms. Minette as our primary consultant going forward. The committee is also indebted to Mr. Samuel Jones and Mr. Richard Stazinski of Heartland Initiative, for their guidance in implementing our human rights investment screen and the Church's No Buy policy on military contracting.

The committee would like to acknowledge Ms. Janet Brown, the Liaison to the Investment committee, and Ms. Diane Pollard, the Liaison to the Executive Council.

Volunteer consultant and past member of CCSR, Mr. William McKeown, Esq., provided many hours of support to the work of the committee; and longtime and founding member of CCSR, now volunteer consultant, Mr. Paul Neuhauser, Esq., continued to provide expert support to the committee in 2023 on developing proxy voting guidelines. The committee is deeply grateful to both Bill and Paul for their longtime work, ongoing commitment, and significant support to the work of CCSR.

The committee also salutes the Church Pension Group and their liaison to our committee, Christopher Rowe, for their active involvement with CCSR in the areas of climate change, human trafficking and board diversity, and support on proxy voting guidelines.

Last, but by no means least, the committee heartily thanks the Treasurer, Mr. Kurt Barnes, the Director of Management and Banking, Margareth Crosnier de Bellaistre, the Director of Government Relations, Ms. Rebecca Linder Blachly, and the staff of the General Convention Office for their unfailing staff assistance, without whom the committee simply could not function.

Mandate

2015 - AN/FFM 008

Resolved, That the Executive Council, meeting in Linthicum Heights from November 15-18, 2015, establish the Executive Council Committee on Corporate Social Responsibility to be responsible for researching the social responsibility records of corporations whose stock is held in DFMS portfolios and recommending appropriate courses of action based on the positions established by General Convention and Executive Council. The procedures for this committee will be as follows: With the approval of Council, it will be responsible for developing shareholder resolutions on social justice issues to be submitted to companies in which the Church invests its funds. CCSR will also review similar resolutions being offered by other churches or advocacy groups and recommend whether the Episcopal Church should support them. These recommendations will be forwarded to the Executive Council through the Standing Committee on Advocacy and Networking. As new issues come up during the triennium, CCSR will forward its recommendations to the next meeting of Executive Council. Membership will consist of nine members, including at least one bishop, one priest or deacon and one lay person; one member of FFM, one member of the Investment Committee, and one member of A&N. Members will be nominated by the Presiding Officers of the Executive Council jointly and elected by Executive Council.

Overview of CCSR's Work

Mission and History

The Committee on Corporate Responsibility (CCSR) of Executive Council strives to assure that the investments of The Episcopal Church align with the values of Jesus Christ.

With the help of CCSR, for over half a century The Episcopal Church has sought positive financial returns on its investment assets while investing those assets responsibly and ethically, consistent with the Church's understanding of the Gospel. Over these years, General Convention and Executive Council, with support from CCSR, have developed criteria and other guidance for responsible and ethical investing by the Church. Specifically, the Church has sought to assure that its assets are invested to support and advance environmental sustainability, justice, and human rights at home and globally, consistent with the Church's teachings as expressed in Convention and Council resolutions.

To support and advance such teachings in the context of investment, the Church has used and uses such means as engagement with companies through dialogue, filing and voting on shareholder resolutions and in elections of directors, divestment and affirmative investment, including ESG (Environment, Social, Governance) investing, and, more broadly, participation in boycotts and sanctions campaigns, as with South Africa. The Church, therefore, takes both passive and active approaches to making its investments align with its understanding of the mind of Christ.

General Convention and Executive Council have direct corporate oversight responsibility for the management of the investment portfolio, valued at approximately \$500 million, owned for the Church by the Domestic and Foreign Missionary Society of the Episcopal Church (DFMS), the corporate mission arm of The Episcopal Church. Within The Episcopal Church many other institutions own and manage separate portfolios of investment assets ranging in value from a few thousand to a few billion dollars. While DFMS does not own these other investment asset portfolios, and General Convention and Executive Council do not have direct corporate oversight responsibility for them, General Convention and Executive Council have broad responsibility, on behalf of the Church for providing guidance, consistent with the Church's teachings as expressed in Convention and Council resolutions, to the Church institutions that do own those assets. Accordingly, General Convention and Executive Council may make investment management decisions for DFMS and may also make recommendations for investing, consistent with those decisions, to other institutional investors in the Church. General Convention or Executive Council may also assign CCSR specific tasks relating to investing by the Church.

Each triennium CCSR addresses assignments received from General Convention or Executive Council and reviews the DFMS portfolio to identify recommended actions in support of those policies. Experienced investment consultants engaged by DFMS advise CCSR in their work.

CCSR then proposes, for the consideration of Council, shareholder engagement and action plans for DFMS or other Church institutional investors. Thereafter CCSR helps DFMS, and on occasion other investors, to execute those recommendations. In so doing CCSR engages with ecumenical and interfaith partners, including the Interfaith Center on Corporate Responsibility (ICCR) and the Church of England.

CCSR was established in response to the call to action from the churches in South Africa in the time of race-based apartheid in that country. In 1969, Executive Council appointed an ad hoc committee on the feasibility of applying ethical criteria to investments in companies doing business in South Africa. In 1970, that initial committee recommended to Council that an ongoing committee be created to address the Church's concern that our investments be in line with our moral charge as followers of Jesus, specifically at that time regarding apartheid.

That same year, Executive Council created a Committee on Social Criteria for Investments, which later became the CCSR. Aply led by its chair, Robert Potter, and with crucial legal advice from Paul Neuhauser, that initial Committee within a year had launched the first ever shareholder resolution campaign about ethical concerns, focusing on South Africa.¹ That resolution was filed by DFMS in January 1971, calling on General Motors to cease business in South Africa, drawing great attention from the press and public. In May 1971, our Presiding Bishop, The Most Reverend John Hines, presented DFMS's resolution at the annual meeting of General Motors, making that meeting ground zero for public awareness of ethical investing.

At the same time as the General Motors action, DFMS filed additional resolutions calling upon two copper mining companies, American Metal Climax and Kennecott Copper, to address the environmental and social effects of their efforts to mine copper in Puerto Rico. Those resolutions were in response to a direct request by the Diocese of Puerto Rico.

Soon thereafter DFMS, led by Paul Neuhauser, became one of the founding members of the Interfaith Center on Corporate Responsibility (ICCR), which to this day gathers faith-based investors to be an ethical voice within the corporate world. TEC, through DFMS and CCSR, continues as an active member of ICCR.

Annual Workplan

CCSR submits an annual DFMS workplan to Executive Council, which Executive Council reviews and approves each fall. Following approval, CCSR engages consultants at Mercy Investment Services and the Heartland Initiative to aid in completing the work for DFMS across the corporate advocacy year, which normally stretches from the fall into the late spring. In several additional areas, committee members work independently of our consultants, particularly in the area of health care access for reproductive and gender-affirming care. We are also planning to investigate the issues of mining and Indigenous land rights. In both these cases, we are pursuing work with coalitions of faith investors.

We also work alongside the staff at The Episcopal Church's Office of Government Relations (OGR), as many of the issues on corporate policy overlap with OGR's work in public policy.

Engagement Strategies

We begin our work in dialogue with corporations whose shares we own, often in partnership with other investors, primarily those that are faith-based. Depending on how that dialogue proceeds, we may also file shareholder resolutions, leveraging the strength of our investment to add additional incentive for the companies to respond to our concerns. In some cases, we are the lead investor in these filings, the ones driving the effort, and other times we follow the lead of our partners. Sometimes the very act of filing the resolutions leads to further dialogue and a response from the company sufficient for us to withdraw the filing. Other times, our resolutions proceed to a vote at the company's annual general meeting. Since most votes at corporate meetings are overwhelmingly in favor, even a significant minority vote can put pressure on the company to make changes, or at least to engage in further dialogue.

¹ "For Five Decades, a Faithful Voice for Justice," History of ICCR, <https://www.iccr.org/about-iccr/history-iccr>; retrieved September 19, 2023.

We understand that this work requires a long-term view in which change happens over many years, even decades, and so we remain steadfast in our commitment to our mission until it is complete.

Our areas of engagement in this period were: **Human Rights, Health and Health Care** (including gun safety, opioids, and health access), **Care of Creation, and Corporate Governance**. A detailed report on our company engagements for the years 2021, 2022, and 2023 can be found following this overview section, covering our work since our last Blue Book Report was filed in the Fall of 2020.

Other Work

In addition to our annual workplan for dialogues and resolutions, CCSR has been working in several other areas:

1. **Defense of Sustainable, Responsible, Ethical Investing and the Freedom to Invest**

In response to a deeply funded campaign by some corporations, including fossil fuel companies, some state legislatures are considering legislation in various forms to prohibit the consideration of climate-related or human rights and conflict-related financial risk in the portfolios and business operations of state and local government investors. Even though these proposals are aimed at government investors and not Church investors, if passed and implemented, such actions would greatly affect our work, and indeed all corporate advocacy in the areas of climate change and human rights. The ambiguities and uncertainties created, and the potential legal risk would dampen the willingness of

large investor groups and investment management companies to include ethical or sustainability risk considerations in their investment decisions, however important considering those risks in fact may be to reaching sound investment decisions.

These legislative and other actions are especially aimed at fossil fuel divestment campaigns but are modeled on legislation aimed at divestment actions concerned with the Occupied Palestinian Territories and other conflict zones. In 2018, the General Convention passed 2022-C013,² “Freedom of Speech and the Right to Boycott,” affirming our opposition to legislation that would penalize non-violent boycotts or divestment. We are deeply concerned about the chilling effect these state actions and political pressure on large investment management firms may have on our work on fossil fuels and human rights, including in the Occupied Palestinian Territories.

We are monitoring this issue via ICCR, and we are participating as a faith-based organization in the Freedom to Invest campaign coordinated by the non-profit investor network CERES Global. To deepen our Church’s discussion of and commitment to this issue, CCSR proposes a resolution to General Convention; please see the resolution at the end of this report.

² 2022-C013: <https://2022.vbinder.net/resolutions/126?house=HD&lang=en>

2. No Buy List:

CCSR routinely reviews the five areas that have been identified by the General Convention or Executive Council for exclusion (or divestment in the case where the Church is already invested):

- Tobacco
- Fossil Fuels
- Military Contracting
- Private Prisons
- Human Rights

In our review of the No Buy List in this period, CCSR focused on three areas in particular: military contracting, fossil fuels, and human rights:

a. Military Contracting:

The following resolution was proposed by CCSR and adopted by the Executive Council in June 2023 which clarified the existing policy and brought TEC's policy more into line with our denominational partners:

Resolved, that the Executive Council Committee on Corporate Social Responsibility, meeting in Cleveland, Ohio from March 25-27, 2023, recommend to Executive Council to amend the 2003 military contracting policy as follows:

Resolved, that the Executive Council hereby adopts a policy on disinvestment, to be reviewed and implemented annually by Council's Committee on Corporate Social Responsibility, which will place on the No Buy List any company (a) among the top five U.S. defense contractors, measured in dollar volume of sales, or b) any company among the top 50 defense contractors that receives more than fifty percent of its revenues from military contracts, and be it further

Resolved, that Council directs CCSR to add companies that make controversial weapons— cluster bombs, anti-personnel land mines, chemical and nuclear weapons— not under the above to the No Buy list, in conformance with past General Convention and Council resolutions, and be it further

Resolved, that a copy of this resolution be sent to any company from which this Church disinvests in accordance with this policy; and be it further

Resolved, that other church investors, including the Church Pension Fund, congregations, and dioceses, be urged to adopt a similar policy to the extent permissible under laws governing fiduciaries."

Resolved, that other church investors, including the Church Pension Fund, congregations, and dioceses, be urged to adopt a similar policy to the extent permissible under laws governing fiduciaries."

We brought this resolution to Executive Council based on existing General Convention resolutions related to controversial weapons systems such as chemical and nuclear weapons. We are aware that new weapons systems have been developed, such as blinding laser systems and lethal autonomous weapons, that are also used against civilian populations. We are submitting a resolution to further clarify our No Buy policy regarding all weapons systems that are used in such a way as to cause mass death, harm, and destruction to civilian populations. Please see our resolution at the end of this report.

b. Fossil Fuels:

In the area of fossil fuels, we note that several fossil fuel companies remain in the equity portfolio of the Church while also being on the No Buy List. This is part of a transition to full exclusion or divestment called for by the 2015 General Convention. Chevron, now the largest oil company in the United States, Phillips Petroleum, and Marathon are the primary remaining companies. CCSR, having reviewed this matter, and noting that it has been eight years since the original divestment resolution, and further noting that the Church of England Pensions Board has now also divested of all fossil fuel companies (June 2023), recommends that the remaining fossil fuel companies still in the DFMS investment portfolio, be finally divested by December 31, 2024. We are putting forward a resolution to General Convention on this matter. Please see our resolution at the end of this report.

c. Human Rights:

CCSR recommended and Executive Council approved of adding the following companies to its No Buy Human Rights Investment Screen³:

- Bezeq Israeli Telecommunications Corp (Occupied Palestinian Territories, providing cellular phone, internet, satellite service to maintain occupation through the Israeli Civil Administration)
- Daimler Truck Holding AG (Russian weapons against Ukraine, weapons to Myanmar junta)
- Mivne Real Estate (does business with the Israeli Civil Administration which maintains the Occupied Palestinian Territories)
- Raiffeisen Bank International (business with Russia/Belarus)
- Southern Copper Corporation (Mexican Preventative Federal Police, private security, paramilitaries with pattern of murders, suppression of human rights, labor rights and violent suppression of protests)

³ <https://www.episcopalchurch.org/wp-content/uploads/sites/2/2023/09/Exhibit-D-No-Buy-List-June-2023.pdf>

We discussed adding several other companies to the list, but decided we should begin with dialogue, offering the following companies an opportunity to respond, before any decision with regard to adding them to the No Buy List: AXA SA, (active in conflict-affected and Occupied Palestinian Territories, Myanmar, Congo, Saudi Arabia, Yemen), Li Ning Co Ltd (forced labor of Uyghurs in China, forced labor in North Korea), and Hilton Worldwide Holding Inc (hotel built on the site of a razed mosque in Xinjiang Uyghur Autonomous Region, China).

3. Economic Justice Loan Committee (EJLC).

EJLC maintains a \$7 million revolving loan fund with a focus on impact investing for social and environmental good. EJLC works with CCSR under its mandate but provides its own Blue Book Report through the Executive Council.

4. Advocacy Account, formerly known as the 100 Shares List:

CCSR notes it maintains a separate portfolio of minimum shares in companies with which it is engaging or provides a list of those companies to the money managers so that if they are considering selling the shares in the DFMS portfolio a minimum number be kept for CCSR's advocacy work.

5. Proxy Voting:

CCSR is grateful to the Church Pension Fund for providing services that allow DFMS to vote proxies in compliance with the TEC's ethical policies (shareholder resolutions filed by TEC or other organizations). This list is reviewed at intervals by CCSR and CPG as a joint effort, although the two entities sometimes have different policies relating to the multiple proxy subjects.

6. CCSR Information Campaign:

The work that we do is a part of the Church's gospel mission in the world, and serve as a model for diocesan and parish based investing, as well as an example of where the church is living what it preaches. CCSR welcomes opportunities and invitations to speak with dioceses, parish, and other institutional investors who would like to know more about our approach to this work.

With that in mind, we have launched an information campaign to highlight our work and provide tools for similar advocacy.

- a. With support from the Executive Council, Trinity Church Wall Street, the Diocese of Western Massachusetts, and the Church Pension Fund, CCSR produced a short video⁴ of our work, “The CCSR Story,” was produced as part of a planned event celebrating the 50th anniversary of CCSR. This was scheduled to be presented at General Convention in 2022 and has now been rescheduled for General Convention in 2024. The committee thanks Mr. Peter Swanson for his excellent production services. We commend this video to the whole Episcopal Church—please share it widely! Our work is often hidden, or at least quiet, and we would love for it to be better known across the Church.
- b. We will be engaging in a communication effort, offering workshops, webinars, presentations, exhibits, and more over the next few years at conferences and other meetings of the larger church. We hope to provide tools for similar work, and to ensure that more people know that their church is actively engaged in the work of Jesus in ways they may not have realized.

7. Collaboration With Other Investors:

Our work is strengthened when we join together. As can be seen in the report, we partner with the Church Pension Fund and with the investment managers for the Church of England. There are also some dioceses and parishes that align their investments with the DFMS / Episcopal Church investment strategies, including our approach to ethical, sustainable investment. We welcome conversation with any diocese or parish interested in pursuing such alignment.

⁴ <https://www.episcopalchurch.org/video/the-ccsr-story>

Summary of Work

Report on Work Accomplished, 2021-2023

Note: We are reporting on our work since this committee's last Blue Book report was filed in Fall 2020.

Acronyms commonly used:

CCSR – The Executive Council's Committee on Corporate Social Responsibility
TEC – The Episcopal Church

DFMS – The Domestic and Foreign Missionary Society, the corporate entity that owns and manages property for TEC

ICCR – The Interfaith Center on Corporate Responsibility, the ecumenical and interfaith body of which TEC is a founding member. Most shareholder activity by CCSR is coordinated with ICCR

SEC – Federal Securities and Exchange Commission which sets regulatory shareholder guidelines
ESG – Environment, social and governance categories for making ethical investments.

EJLC – Economic Justice Loan Committee

CCLA—Churches, Charities and Local Authorities Investment Management Limited, the investment management company for nearly 13,000 Church of England parishes, dioceses, cathedrals and other Church of England bodies; CCLA is predominantly owned by its church and not-for-profit clients and manages over £2.7bn of Church of England assets.

2021 Engagements

The Domestic and Foreign Ministry Society of The Episcopal Church (DFMS) advocacy work consists of multiple engagement methods including company dialogues, filing resolutions, and sending letters. For the 2021 proxy year, DFMS conducted 38 engagements at 36 different companies, and filed nine resolutions, seven of which have been withdrawn due to agreement with the company. This report provides a summary of activity in the 2021 proxy year by Mercy Investment Services, Inc., our contractor for socially responsible advocacy efforts.

Human Rights

Objective – Sex Trafficking: Engage travel companies such as hotel, airline, and trucking companies on compliance with best practice standards to mitigate labor trafficking, and child and women sexual trafficking.

McDonalds (Dialogue)

A letter of inquiry was sent outlining investors' concerns about human trafficking and how companies in the restaurant sector can help prevent trafficking and assist victims. The letter requested a dialogue to discuss in greater detail how the company can be a part of the trafficking solution. No response at this point.

Objective – Human Rights: Engage companies on efforts to ensure compliance with human rights standards in their own workforce, supply chains, including outsourced labor brokers, requirements in subcontractor contracts, compliance audits and performance/improvement measurement.

Delta Airlines (Dialogue)

Delta Airlines issued a statement from CEO Ed Bastian noting the company's opposition to the new voting rights legislation in Georgia that includes new requirements that will make it harder for Black and Brown communities to vote. The memo also noted Delta's efforts to engage elected officials to remove some of the most egregious measures from the bill and acknowledged that the bill and others like it are a response to unfounded claims of voter fraud during the 2020 elections. The company reiterated its commitment to support voting rights and that it will continue the get-out-the-vote efforts throughout the country. Delta also continued to look at human trafficking efforts within the airline and started an to donate miles to Polaris to help victims and survivors of trafficking rebuild their lives.

Mid-year update included a call with Delta to discuss their progress in addressing human rights issues and developing a formal policy, its ongoing adaptation to the COVID-19 situation and plans to resume operations, and its efforts on DEI issues. Anti-trafficking training remains mandatory for all pilots and

flight attendants and Delta's reached near 100% completion for its customer service and technical operations teams. Although it had limited engagement with NGOs and legislators during the pandemic, it planned to continue those partnerships and resume joint events and initiatives, such as providing internships to trafficking survivors and engaging with Congress. Delta has a general policy against human rights abuses and noted willingness to assess expanding the scope and welcomed resources from investors on human rights policies.

United Airlines (Resolution)

After no response to attempts to engage in dialogue with investors, DFMS was lead filer on a resolution requesting that the Board of Directors prepare a report on the company's management systems and processes to implement the commitments outlined in its human rights policies. Call with United discussed the human rights disclosure proposal. The company explained that since the adoption of its human rights policy in 2014 it has taken a targeted approach to implementing it and has focused on areas where it can have the most impact, like trafficking prevention. United acknowledged that it needs to improve its ESG disclosure, and this is something investors can expect in 2021, starting with an updated CSR report this spring. The company shared updates on how it has been addressing human rights issues, including an update on its trafficking prevention training program and the work of its procurement team on embedding clearer expectations on human rights within supplier/vendor contracts. It is open to and interested in having more regular engagements with shareholders and in expanding its work and disclosure on ESG issues. Shareholders withdrew the proposal based on the updates shared during the March call, as well as the following commitments: 1) continued engagement with investors, including two additional dialogues in 2021; and 2) the company will explore ways to increase disclosure of the company's efforts to prevent human trafficking and address human rights risks in the supply chain.

Objective – Conflict Affected and High-Risk Areas: Engage companies operating in areas of civil and/or labor strife or racial disparagement (e.g., Democratic Republic of Congo, Israel/Palestine, Peru, Indonesia, and U.S.) on due diligence processes and/or enhancing their capacity to deal with potential human rights violations, in either case to help assure they are not directly or indirectly financially benefiting armed groups or engaged in repressive practices impacting indigenous peoples. Develop Human Rights Screen for Israel/Palestine and all occupied areas as well as areas of conflict.

ABB Ltd. (Dialogue)

The lead sold the stock and Mercy Investment Services took over that role. The Business and Human Rights Resource Centre (BHRCC) referred the company to Mercy. We hoped the engagement would restart quickly, with the understanding that if the company failed to respond, pressure would be needed in 2022.

Booking Holdings (Dialogue)

DFMS supported ongoing efforts to engage the company on the development of a global human rights policy, including a specific component for conflict-affected and high-risk areas (CAHRA). Bookings has engaged Business for Social Responsibility (BSR) to do a human rights review (not a full impact assessment) and develop a corresponding policy. The company noted they do see conflict entailing higher risks and is developing plans on how to address these operational contexts and has agreed to ongoing investor engagement, including an opportunity to review and provide detailed

feedback on the draft policy. A call provided updates on the company's progress at developing a CAHRA specific component as part of a broader human rights policy. BSR developed a policy grid and timeline for the company on how to move forward.

Chevron Corporation (Resolution)

A letter was sent asking for dialogue concerning the human rights and operational risks associated with activities in CAHRA, following the company's acquisition of Houston-based Noble Energy. DFMS was the lead filer on a shareholder resolution asking for an assessment and report on the company's approach to these materials risks. DFMS received a letter indicating the company has challenged the resolution with the SEC based on substantial implementation. Investors withdrew the resolution in return for three dialogues this year around how the company will consider conflict risks. Particular focus of the dialogues would be how such risks are identified, assessed, prevented, mitigated, and disclosed through ongoing development and revision of corporate policies and practices. Following the February 1 military coup in Myanmar, where Chevron is working in partnership with Total and the Myanmar Oil and Gas Enterprise, a call was arranged by DFMS to discuss the company's risk mitigation efforts with senior Chevron staff. In light of the lackluster company response, growing momentum among global investors concerning Myanmar, and Chevron's recent decision to shut down the Tamar gas pipeline in the Eastern Mediterranean due to the recent escalation of the Israeli-Palestinian conflict, the DFMS-led coalition began considering specific asks of the company related to both of these operations and a broader conflict.

Expedia (Resolution)

Following a year of no movement, a resolution was filed calling for Expedia to assess and report to shareholders, on the company's policies and procedures to address the human rights risks associated with business activities in conflict-affected and high-risk areas (CAHRA). In the first meeting, the company shared how it assesses risk to travelers and attempts to mitigate conflict-related risks by abiding by various sanctions regimes. The company stated that it will consider human rights reporting and how it fits in with its code of conduct. The resolution was withdrawn after the company shared its draft Human Rights Policy, requested and received analysis of the policy from investors, and agreed to continue the dialogue concerning the ongoing refinement of the policy. Company later reported that the board adopted the new Global Citizenship statement at its June 9 board meeting and that it would be available on the company website soon.

General Mills (Dialogue)

Pillsbury frozen baked goods are produced in a factory located in the Atarot Industrial Zone, part of Israeli-occupied East Jerusalem. International and Palestinian advocacy organizations are concerned about how these business activities may violate international humanitarian and human rights law and financially incentivize the occupation. Investors are determining how best to engage the company concerning the issue in light of the boycott initiated by advocacy organizations.

Heidelberg Cement AG (Dialogue)

DFMS supported ongoing efforts to engage the company regarding enhanced human rights due diligence in CAHRA. Discussions to date have revealed the company is assessing these issues, but using internal staff, mainly performing desk audits, is doing so in a reactive, *ad hoc* manner based on open conflict, and is not consistently applying international humanitarian law. The company does not provide specific training on this issue, and there are no planned engagements with NGOs on the ground. It does reassess conflict and other human rights risks every three years. A follow-up email thanked the company for dialogue and asked for country assessments concerning human rights risks. Concerning one high-risk area, international nonprofit Inclusive Development International facilitated a virtual meeting for investors to engage with community leaders from the Indonesian NGO JM-PPK. The organization is leading a growing international campaign concerning Heidelberg Cement's planned limestone quarry and cement plant in Central Java, which threatens local communities' homes, water, health, and cultural/religious practices. After the company stopped responding to requests for calls and additional information, the lead submitted a counter-motion at the annual shareholders meeting on May 6, calling for adequate and transparent human rights due diligence in CAHRA, especially in light of the pending German Supply Chain Act, which makes such processes and disclosures mandatory. Lead followed up with company post AGM where comments were made regarding a desire to continue to engage in points made in the counter-motion.

TripAdvisor (Dialogue/ Resolution)

Shareholders met with the corporate secretary to get an update on the next steps concerning its recent materiality assessment. At the end of the meeting, the report was shared, and the investor group reviewed and circulated comments to one another. The firm that did the materiality assessment is not seen as an expert in human rights work, and the assessment appears to reflect that lack of knowledge. Follow-up discussion focused on the coalition's concerns that the consultants were not familiar with human rights issues; it was only a desk audit not reflecting the risks of stakeholders on the ground, and the report itself was sloppy. The company agreed to look at the possibility of creating a human rights policy first, then a subsequent human rights impact assessment. A follow-up proposal filed by partner Mercy Investment Services requested the Board of Directors to develop and adopt a comprehensive Human Rights Policy stating the company's commitment to respect human rights throughout its operations and value chain, and describing steps to identify, assess, prevent, mitigate, and, where appropriate, remedy adverse human rights impacts connected to the business. The company shared a first draft of its global human rights policy, which failed to meet current best practice and did not address shareholders' specific concerns related to CAHRA. Nevertheless, it was decided to withdraw the resolution in exchange for serious discussions around how to further refine and implement the policy, including in areas with heightened risk. Investors sent an email concerning Myanmar hotels and how the new company policies address the human rights issue and requesting another dialogue. No answer was received as of the end of June 2021.

Health and Health Care

Objective – Gun Safety: As a public health issue, engage gun manufacturers to adopt more smart technologies for weapons and 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.

Smith & Wesson Brands Inc. (f/k/a American Outdoor Brands Corporation) (Dialogue)

The company uses an off-cycle proxy year, which means actions of the resolution filed in Spring 2020 move into the following proxy year activities, which start in July. The company sent a no action letter to the SEC which was responded to by the lead filer. The company produced a Corporate Stewardship Policy, which although not the human rights policy investors sought, investors believed it reflects a good faith attempt by the company to engage with shareholders regarding their concerns and the resolution was withdrawn. The company indicated it would consider further dialogues around a human rights policy and investors are considering next steps. DFMS co-filed a new proposal in April 2021 requesting the company adopt a comprehensive policy articulating its commitment to respect human rights, which includes a description of proposed due diligence processes to identify, assess, prevent and mitigate actual and potential adverse human rights impacts.

Objective – Gun Safety: Engage industries such as credit card companies, shipping companies, and financial institutions on their impact on the epidemic of gun violence in the United States.

Mastercard and Visa (Dialogue)

Dialogues were held based on the letter shareholders sent in January 2021 about untraceable firearms purchases. Each company maintains it only facilitates legal transactions and can't see every purchase a customer makes.

Objectives – Opioid epidemic: Engage opioid manufacturers and distributors about their corporate policies on the marketing or promotion of drugs that lead to addiction and how the company takes responsibility for these practices; Engage pharmaceutical companies that manufacture antidotes to opioids about their pricing practices.

AbbVie (Dialogue)

AbbVie merged with Allergan, which had a Board Report on oversight of opioids. An email sent to AbbVie asked if it plans to continue sale of opioid products and if so, whether it will engage in similar Board Oversight of opioid sales. AbbVie responded that it was assessing the Allergan business lines and followed-up after its assessment by replying that it had started the process to discontinue the three branded opioid products that were remaining at Allergan when the company was acquired. Once the discontinuation process is complete, it will no longer have any opioid products. On a call about the independent chair proposal, investors asked the company to set aside adequate funds for potential settlement of Allergan opioid claims.

Johnson & Johnson (Resolution)

DFMS co-filed a resolution with the Illinois Treasurer's Office requesting Johnson & Johnson issue a report to shareholders describing the governance measures JNJ has implemented since 2012 to monitor and manage more effectively the financial and reputational risks related to the opioid crisis. Shareholders followed-up by asking JNJ to add information about opioid sales outside the U.S. and add metrics recommended by SASB. The resolution was withdrawn based on substantially complete board oversight report and a promise to continue dialogue about the matter.

Viatrix (f/k/a Mylan N.V.) (Dialogue)

Viatrix acknowledged that it did not adopt the Mylan Opioid Board Oversight Report when it became Viatrix, but assured investors that it will work internally to prepare a Viatrix draft report and get it approved. It reported that Viatrix' filing deadline was not yet set, but it will inform investors in advance. The corporate secretary promised that Viatrix would have a new opioid oversight policy by June 30 and that the policy would include the changes shareholders suggested for the Mylan policy and would seek shareholders' input on the new policy.

Walgreens Boots Alliance, Inc. (Dialogue)

Investors sent a letter to the chair of Walgreen's compensation and leadership performance committee asking about incentive pay practices that exclude, or are adjusted to exclude, the impact of costs associated with opioid litigation and settlements. Company responded with a letter saying its incentive program determination follows a rigorous process to understand all the impacts of its business, to ensure programs are aligned with Walgreen's business objectives.

Care of Creation

Objective – Water and Healthy Communities: Engage companies on science-based water stewardship targets and the human right to water, in their operations and their supply chains.

Coca-Cola (Dialogue)

Company issued its 2020 ESG report that details the latest statistics from its water replenishment program: 170% of the water used in manufacturing was returned to nature and communities in 2020, either directly, or through support for water access programs. The report also launched Coca-Cola's new 2030 water strategy to increase water security in high-risk areas of operations with a more context-based approach and to reduce water risk in its agricultural supply chain.

Constellation Brands (Dialogue)

A letter was sent to the company outlining investor concerns about the company's management of water risk and requesting dialogue. A call with company's ESG director discussed company's approach to water risk after its experience with community opposition to its proposal to expand its brewery in Mexicali. Company noted that it followed all local rules and regulations and consulted with the government about its plans (we noted there was nothing about community consultation) and was defensive when asked what it had learned from its experience. The company is about to issue its first company-wide targets (early June 2021) and since the Mexicali problems it has centralized its sustainability practices and is reporting regularly to the board on progress. The company believes it has always "done the right thing" but failed to talk about it and knows that investors are looking for more information. It has begun to look at water risk in supply chains and recently joined the Sustainable Agriculture Initiative. It believes it has internal processes that respect human rights but admits that it lacks a formal policy and thinks it is something to investigate; investors recommended some peer company examples and NGOs that could assist with that.

Objective – Climate Change and a Healthy Environment: 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 (Dialogue)

Investors sent a letter to the company asking for more detailed reporting on how it supports public policies that align with the goals of the Paris Agreement to reduce emissions and transition to cleaner sources of energy. A call with the company discussed climate lobbying disclosure. Company is working

on a new climate risk report to be released this spring. The company pointed to its political spending disclosures as among the best; investors noted Ameren's leadership and urged similar disclosure of its lobbying activities through trade associations and other organizations. Company understands risk in relationships with 501(c)4 organizations after the FirstEnergy scandal and board is having "very robust" discussions. Company asked to see examples of climate lobbying disclosures.

Chevron Corporation (Dialogue)

Call with company to discuss the need for more ambitious short-term and medium-term targets outlined in the company's recent climate report. Also suggested improvements to the company's disclosure of its climate lobbying efforts, a push for a stronger effort to address scope 3 emissions, and a discussion of the company's future price assumptions and accounting practices. Investors also asked for a conversation with some of the company's independent directors to get a better sense of their ongoing oversight of climate issues; the company was amenable to trying to arrange this with the engagement leads.

Delta Airlines (Dialogue)

A letter was sent to the CEO and board chair introducing the Climate Action 100+ benchmark and net zero emissions pledge. Climate Action investors met with company to discuss its carbon neutral goal and plans to implement. Company reported plans are moving forward, but items that have costs associated with them may be delayed due to COVID impact on business. Company is not considering a science-based target (SBT) at this time because it needs to rely on carbon offsets at least in the short/medium term because of limits in technology and sustainable biofuel supplies; but will work to limit offsets over time. Company reported it is working to develop metrics and incorporate goals into executive compensation, but probably won't get that done until after COVID impact recedes. A call with the company discussed its plans to increase use of biofuels and how it is considering sustainability impacts of current and potential biofuel feedstocks, particularly biodiversity and land use impacts. It is working with industry groups globally, including participation from the Roundtable for Sustainable Biomaterials and ISCC. The industry is very early in the process but is trying to include sustainability as things develop. Federal and state incentives will be a critical part of scaling up supplies and trade associations are working in that space. In a second call with company, discussion focused on its climate lobbying activities and disclosure. Company noted that trade association policy positions do not always reflect Delta's own position, but that it has pushed them, and that pressure is reflected in recent announcements on net zero emissions and biofuels subsidies. Company believes its disclosure of payments and its own lobbying activities is adequate for investors to understand what the company supports.

Phillips 66 (Resolution)

DFMS co-filed a proposal requesting that the Board of Directors conduct an evaluation and issue a report within the next year describing if, and how, Phillips 66's lobbying activities (direct and through

trade associations) align with the goal of limiting average global warming to well below 2 degrees Celsius (the Paris Climate Agreement's goal). The report should also address the risks presented by any misaligned lobbying and the company's plans, if any, to mitigate these risks. A call was held with the company to discuss the proposal. It believes that its lobbying disclosures are better than many of its peers but is concerned that a report focused on climate lobbying would focus on a single moment in time, becoming outdated quickly. Investors asked for more information on how the company interacts with its trade associations around climate policy and for it to report on how it is or isn't aligned, as well as on steps taken where there is misalignment. Company indicated its willingness to put some expanded information in its CSR report, but it is not clear exactly what information that might include.

At the mid-year point, investors held a call with the company's ESG director and IR manager regarding the majority vote of 62.5% on the climate lobbying proposal. The company reported taking the advisory vote seriously and that it has started working on a report but did not have a publication date. It would likely be an electronic only report and the company would be convening an internal working group led by its government relations team. Investors made several suggestions about content and shared best practices and some examples and reports.

Valero Energy Corporation (Resolution)

In a call with the company's ESG manager, investors emphasized the importance of Task Force on Climate-Related Financial Disclosures (TCFD) reporting; company asserted that we are the only investors pushing TCFD with company and it is planning to use SASB standards for its upcoming reporting. Company is looking at targets and notes that new disclosure will show its leadership on biofuels and in other areas. Investors shared interest in better disclosure around lobbying activities and how company spending on lobbying and other political influence activities aligns with a lower carbon future and the goals of the Paris agreement. The company would like to have a deeper conversation about climate lobbying and understand better what investors would like to see. Investors noted there would be a proposal filed, but that dialogues should continue. DFMS and partners co-filed a proposal requesting that the Board of Directors conduct an evaluation and issue a report within the next year describing if, and how, Valero's lobbying activities (direct and through trade associations) align with the Paris Climate Agreement's goal of limiting average global warming to well below 2 degrees Celsius and how the company plans to mitigate risks presented by any misalignment. Another call followed the filing, and the company said it is considering what the future regulatory landscape will bring and had a recent strategic planning discussion of its board, looking at possible directions for the company. It is looking at revamping its lobbying disclosure on the website to make it more accessible and will be willing to do the reporting investors requested. The proposal was withdrawn after the company agreed to produce the report on climate lobbying activities requested and to update the information going forward. It also agreed to future dialogue on the issues.

In a call with General Counsel Rick Walsh, discussion focused on the company's investment in the Byhalia pipeline, a subject of criticism from groups in Memphis and elsewhere on environmental justice grounds. The project is a joint venture and the crude oil that it will deliver is not for Valero's use but will be a branch off an existing pipeline that it uses. Primary user will be Marathon Petroleum. Community stated it has a strong community engagement policy and tends to have good relationships with its fence line communities due to past experiences, but the engagement here was done by its partner, Great Plains. Great Plains tried to reach out to the community and reports it has also tried to plot the pipeline in a way that will impact the least people and the least environmentally sensitive areas but sees that mounting criticism may mean that the project will not be built. Company stated is looking for ideas and solutions; sees this as a growing concern for building new energy infrastructure. The company acknowledged it needs a constructive new way to approach these problems even if this project doesn't get built.

Mid-year follow-up conversation regarding the company's climate lobbying report: The company reported it is working on an update to its political spending web pages that will include the report and that it hopes to have it live by the end of summer. The company also reported it is working on an updated climate risk report; it will not be able to include the new IEA net zero scenario in data analysis because the data sets for the new scenario will not be available in time but will likely include information from the scenario in the narrative of the report. It will report verified Scope 1 and 2 emissions and begin reporting on some Scope 3, but methodology for estimating Scope 3 is not robust yet. The company will report against existing short-term targets.

Objective – Climate Change and a Healthy Environment: Engage companies, particularly in the energy and utility sector, to improve public disclosure and transparency in reporting presented by 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 (Dialogue)

Call was held to discuss the company's new ESG report and the Climate Action 100+ benchmarks, including the request that companies pledge to meet net zero emissions by 2050. Investors noted improved disclosure by the company, but would like to see TCFD compliance, including scenario analysis and noted that could lead the company to be more comfortable with long-range targets (its current emissions target only goes to 2050). Company stated it believes it is not getting credit for its strong investment in renewables through its competitive energy business; focus is on regulated assets, which are moving more slowly, but it will exit coal completely within two years. Mid-year update: A letter was sent to company CEO asking company to make a public commitment to net-zero emissions by mid-Century and to outline plans to achieve this goal.

Objective – Climate Change and a Healthy Environment: Engage financial institutions to ensure commercial lending and investment policies address socioeconomic and environmental concerns, particularly climate change, water stewardship, pipelines, financing in their lending practices.

American International Group (Resolution)

In a call with the company, investors again pushed for increased reporting of climate risk in its investing and insuring business. It is waiting on trade association work on industry scenario analysis for deeper dive into the question of risk. Investors suggested joining Climate Action 100+ to identify and better manage investment risk. DFMS co-filed a resolution requesting that the Board of Directors conduct an evaluation and issue a report within the next year describing if, and how, AIG's lobbying activities (direct and through trade and other associations) align with the goal of limiting average global warming to well below 2 degrees Celsius (the Paris Climate Agreement's goal) and how the company plans to mitigate risks presented by any misalignment. An online meeting was held with the independent director who said the company is coming out of major reorganization and lobbying activities are just restarting. He understands that investor expectations regarding disclosure are increasing, particularly regarding climate action, and it is looking at new commitments this year.

Objective – Climate Change and a Healthy Environment: With the Church Pension Fund, push for the addition of a sustainability expert on the board to advocate for positive impact on the environment in line with COP21.

FLIR Systems (Dialogue)

A letter was sent to FLIR regarding sustainability reporting and ESG issues, with a request to meet with the company. A call was held with company leadership to discuss the ESG issues raised. The company believes it has good sustainability practices and that its products are part of sustainability practices for many of its customers but knows that it needs to improve disclosures. It submitted its first report to CDP this year and have provided more information in its 2020 proxy and on its website. Investor suggested that more information about how its board oversees ESG would be a helpful piece to include, as well as to think about adding ESG to the charter of a relevant committee and identifying board members with expertise in sustainability issues. The company is thinking through an initial citizenship report that will focus on more than philanthropy efforts. It was announced the company is merging with Teledyne Technologies, and a special meeting of stockholders approved the merger in May.

General Dynamics (Dialogue)

A letter was sent to the company CEO requesting more information about the company's board and its oversight of sustainability issues. A response was received from the company CEO offering to set

up a call with investors to further discuss the issues raised in the letter. The letter also noted that the company plans to charter a new sustainability committee this year and has appointed a new board member with significant sustainability experience and expertise.

Corporate Governance and Accountability

Objective – Diversity on Corporate Boards of Directors: Engage companies to address board diversity to include women and people of color.

Skechers (Dialogue)

A call was held with The Thirty Percent Coalition and Skechers. There was a brief discussion of Skechers perceived hurdles (small company, how to reward those men who had been there a long time and made significant contributions). Investors committed to sending them the Rooney rule language and the company would take that to the nominating committee. A follow-up email was sent with desired charter language.

2022 Engagements

The Domestic and Foreign Ministry Society of The Episcopal Church (DFMS) advocacy work consists of multiple engagement methods including company dialogues, filing resolutions, and sending letters. For the 2022 proxy year, DFMS conducted 39 engagements at 34 different companies, and filed nine resolutions.

Human Rights

Objective – Trafficking: Engage travel companies such as hotel, airline, and trucking companies on compliance with best practice standards to mitigate labor trafficking, and child and women sexual trafficking.

McDonalds (Dialogue)

Dialogue was held late summer with McDonalds to discuss a number of issues, including how the company could contribute to trafficking prevention. McDonalds shared that several of their carriers are already Truckers Against Trafficking (TAT) members and train their drivers on trafficking

prevention. McDonald's agreed to follow-up with the number of drivers trained and number of TAT sponsors, as well as to have further conversations about how they can support trafficking prevention efforts. A follow-up call in the spring touched on some workforce issues following up on COVID concerns including paid sick leave. The company reported providing three sick dates throughout the system to all employees.

Airlines (Dialogue)

Dialogue with United covered updates on their trafficking prevention training, implementation of their human rights policy, and disclosure plans in their CSR reporting. The company reported that human trafficking prevention training is mandatory for their frontline staff (e.g., flight attendants, pilots, ticket agents) and in 2021 they trained about 20k employees.

Objective – Human Rights: Engage companies on efforts to ensure compliance with human rights standards in their own workforce, supply chains, including outsourced labor brokers, requirements in subcontractor contracts, compliance audits and performance/improvement measurement.

United Airlines (Dialogue)

United has also embedded its Human Rights Policy Statement into the annual ethics training. United reported that it has added provisions in supplier contracts to address human rights risks (e.g., debt bondage, ethical recruitment processes, no recruitment fees, etc.) and that site visits to supplier facilities are part of the vetting and compliance verification process.

Delta (Dialogue)

In Delta's DE&I progress report, the company highlights some of the initiatives and progress from 2021: creating a talent development pathway to support the advancement of internal employees and grow the pool of diverse talent; increasing the number of external Black candidates for manager and above positions; and converting more part-time reserve employees, 70% of whom are minorities, to full-time positions. The company reported engaging senior leadership in racial equity workshops where over 62,000 employees have completed at least one DE&I training course. Also, the company reported it will be creating an equity-focused pillar for community engagement initiatives and increased charitable contributions to equity-focused organizations. Lastly, the company spent \$325 million with Black-owned businesses, 74% of the annual spending target.

In a mid-year update, Delta reported that it had released 2021 ESG report, including the results of Delta's biennial ESG materiality assessment that identified the top 20 material issues for the company, including DE&I, employee compensation and benefits, ethical conduct, and climate change management among others. To foster employee health and well-being, Delta reported enhancing its health care offerings and introduced a new co-pay plan with lower deductibles. The

company reported that by the end of 2021, Delta had a 95% domestic employee vaccination rate, and in 2022, implemented a 4% across-the-board pay increase to employees below the Officer level. On DE&I, Delta began reporting its EEO-1 data and committed to closing the gap between frontline representation and leadership, with particular focus on advancing women, Black, and other underrepresented racial and ethnic groups. Delta converted part-time reserve employees, 70% of whom belong to underrepresented racial and ethnic groups, to full-time positions. The company also committed to doubling spending with Black-owned businesses to \$690 million by 2025 and reported spending \$315 million in 2021.

Delta reported expanding its work on sustainable sourcing and is working with EcoVadis, a sustainability platform, to assess ESG issues in supply chains. Delta also reported that it is integrating sustainable and responsible sourcing standards into its Supplier Code of Conduct, RFP process, and contract templates. The company noted it is continuing its anti-trafficking efforts through training and NGO partnerships.

In an additional call with Delta, the company reported on its trafficking prevention and human rights efforts, DE&I commitments, and ongoing COVID response. With pandemic restrictions easing, Delta resumed its engagements with external partners including Polaris, Wellspring Living, and federal agencies working on trafficking prevention. Wellspring Living provides holistic support to trafficking survivors and Delta has supported the organization through financial donations and internship opportunities. Thus far over 60,000 Delta employees have been trained on trafficking prevention and it remains a core component of regular staff training programs. Delta is working with EcoVadis, a third-party sustainability ratings platform, to rate Delta's suppliers on ESG issues and to be more proactive in vetting suppliers on potential risks.

On DE&I, Delta is using its Close the Gap strategy to identify and address systems, policies, and other barriers that contribute to diversity and equity gaps. The company reported making progress in increasing representation of women, black, and other underrepresented ethnic groups in four main leadership job categories. Delta conducted a full pay equity analysis in 2021 and made corrections for any identified disparities. Delta increased all starting wages to at least \$15/hour and in May 2022, implemented a 4% increase across the whole pay scale.

Objective – High Risk and Conflict Affected Areas: Engage companies operating in areas of civil and/or labor strife or racial disparagement (e.g., Democratic Republic of Congo, Israel/Palestine, Peru, Indonesia, and U.S.) on due diligence processes and/or enhancing their capacity to deal with potential human rights violations, in either case to help assure they are not directly or indirectly financially benefiting armed groups or engaged in repressive practices impacting indigenous peoples.

ABB Group (Dialogue)

Heartland Initiative reported the company has been unresponsive to engagement attempts both from the previous coalition lead (Miller/Howard Investments) and the current leads (Mercy/DFMS), but Heartland planned to conduct a fresh round of research and analysis concerning the company's risk exposures in conflict-affected and high-risk areas and a final attempt will be made to expand the current investor coalition and engage the company on these risks. However, due to the war in Ukraine taking precedence further work was postponed to 2023.

Booking (Dialogue)

Heartland reported on the engagement led by Wespath, Booking Holdings hired BSR to develop a global human rights policy. Initial drafts, shared with the coalition, demonstrated the potential for a robust policy and set of corresponding practices, including on conflict-affected and high-risk areas, not only for the online tourism industry but across sectors. However, the last conversation with Booking staff indicated that internal challenges may threaten both the content and transparency of the new policy. Wespath agreed to send an email regarding our concerns and an update call for the coalition was planned.

Booz Allen Hamilton (Dialogue)

Heartland reported that the company developed an ESG & Annual Reporting Hub that will include reports based on the UN Guiding Principles on Business and Human Rights, the Global Reporting Initiative, and the Sustainability Accounting Standards Board, among others. In spite of this progress, significant concerns remain regarding Booz Allen's ongoing contracts with the Kingdom of Saudi Arabia and other rights-violating states. However, no future engagements were planned for 2023.

Chevron Corporation (Dialogue)

In January 2021, Chevron indicated that the company would be withdrawing from Myanmar, taking its lead from its operating partner on the Yadana pipeline, TotalEnergies, which made a similar statement that day. The company's decision prompted the investor coalition led by Mercy and DFMS to consider what would constitute a responsible exit from Myanmar and the company's ongoing need to address systemic risks related to conflict-affected and high-risk areas, especially in light of recent stories around its business activities in Equatorial Guinea and Kazakhstan. A call will be scheduled with Chevron to discuss these concerns in March. A follow up email was sent asking for dialogue to explore questions on movement out of Myanmar.

Company reached out concerning leaving Myanmar. No end date has been announced but they are looking for a responsible transition. Shareholders pushed for transparency in this process as well as

a revision of their policy to account for needed enhanced due diligence in conflict areas. Staff indicated they would take this information forward.

Mid-year update: After shareholders spoke with Crude Accountability DFMS partners met with Chevron. The company owns 15% of the pipeline and 13% of the oil going through it is Russian. Concerns still exist here, and the company states they're working with BSR and Maplecroft on tools for CAHRA reviews. Although exploring a different route is certainly one possible outcome, that is extremely hard geographically and expensive. Chevron is seeking to look at a more systematic approach to the issue. They also indicated they were looking at SASB as to where there are the greatest gaps in disclosure. When questioned about Myanmar, they stated that they have not left yet. Company stated it is still concerned for safety of their people and the operator. There was no specified deadline, but company reported movement is occurring. In terms of Noble acquisition, that work is now set in the sustainability team to review.

Cisco Systems (Dialogue)

Heartland reported they are preparing an initial letter of engagement for Cisco Systems, to be sent by Wespath (lead) outlining human rights risks related to the company's partnerships with rights-violating states (e.g., Saudi Arabia, UAE), development of ICT infrastructure in occupied territories (e.g., Northern Cyprus, OPT, South Ossetia/Abkhazia), and forced labor in its supply chain (e.g., via companies in Xinjiang Uyghur Autonomous Region). In addition, efforts to solicit additional investor involvement in the engagement will begin in earnest in March 2022 with a letter to be sent in May/June.

Expedia Group (Dialogue)

Heartland reported they have learned that Expedia hired an ESG consultancy firm to develop the company's global human rights policy (mirroring Booking's process) and was subsequently interviewed by that firm. This represents a positive development for the coalition led by Presbyterian Church (USA) and adds more momentum to the possibility of a private roundtable on online tourism and human rights.

General Mills (Dialogue)

An introductory letter has been sent to company asking for dialogue concerning enhanced due diligence in conflict-affected and high-risk areas. Company responded with their latest human rights framework which led to a follow up with company highlighting risks and questions associated with OPT and other conflict affected and high-risk areas. Company agreed to meet in the spring of 2022.

After several attempts to get a meeting scheduled, the company agreed to a 1/2-hour call at the end of March 2022 to talk about human rights in conflict areas. The company's first response was to explain their current policy to identify salient human rights issues, including child and forced labor. ICCR partners' concerns about growing human rights issues in conflict areas were shared and the

company said they understood the position but could not tell us any more at that time. In a later follow up, ICCR partners asked them to enhance their due diligence in conflict areas and look at the contradiction of policy to the OPT actions, specifically the presence of the factory in the Atarot Industrial Zone. The company acknowledged the conversation in an email and that they heard shareholders' concerns about the West Bank facility. They indicated they hope to provide news on that front in the next few months. They also indicated the company will evolve their approach to human rights and how to navigate high risk contexts. The email also shared the new 2022 Global Responsibility Report.

Heidelberg Cement (Dialogue)

Heartland reports the engagement resumed after Wespath filed a shareholder countermotion at the company's AGM in the summer of 2021. Since that time, the coalition provided examples of current best practice related to conflict-affected and high-risk areas, discussed specific company measures (prevention, mitigation, and reporting) that would address our concerns, and the steps the company is taking to prepare for the German Supply Chain Act. A company call should take place in the summer when a human rights staff member will have been hired and the reporting requirements for the Act have been finalized.

TripAdvisor (Dialogue)

Company reported last summer that it has adopted a final Human Rights policy. The company group is trying to codify their core values and they will touch on traveler safety, discrimination, criminal activity, animal welfare and right to speech. Next outreach was planned focus on the company's potential participation in a private roundtable and updates to their policy.

This company lags behind the other two engaged online tourism companies - Booking and Expedia in terms of its global human rights policy and has remained unresponsive to successive requests for updates. Following the release of the Booking policy and advancement of Expedia's policy development process, ICCR partners agreed to reach out again to TripAdvisor to schedule an update call and discuss the company's potential participation in a private roundtable.

Western Digital (Dialogue)

Lead had followed up on summer call with examples of good Human Rights Risk Assessments (HRIA). Company responded saying they would get back, but never did; in February a second follow-up letter was sent asking for progress on HRIA and a time to set up a call. In a spring 2022 call, Western Digital was praised for conflict minerals report and that they did HRIA. Upon probing shareholders found out that it was a desk audit but they did contact eight outside organizations and twenty inside organizations, both supply chain and downstream groups. The review of EEO data was migrant and gender issues, then sexual violence due to location, health, and safety, then supply chain risks. Company stated they are not involved in the Xinjiang Uyghur Autonomous Region (XUAR) but can't

verify how they got that data. Company was asked how they will implement recommendations from their contractor.

There was a follow up email sent to company asking how company identifies high risk areas, and how they evaluate governments compliance with human rights in countries they work ; specifically, China and XUAR was noted as it seems difficult to audit there.

The company stated it has a due diligence policy but is not going to move further with it right now. Heartland suggested refocusing on a different policy. Despite progress and continuing concerns, it was felt that more change is possible with other companies, so work will be sunset for 2023.

Health and Health Care

Objective – Gun Safety: As a public health issue, engage gun manufacturers to adopt more smart technologies for weapons and 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 industries such as credit card companies, shipping companies, and financial institutions on their impact on the epidemic of gun violence in the United States.

Sturm Ruger (Resolution)

DFMS filed a shareholder proposal with Sturm Ruger urging the Board of Directors to oversee a third-party Human Right Impact Assessment which assesses and produces recommendations for improving the human rights impacts of its policies, practices, and products, above and beyond legal and regulatory matters. An exempt solicitation was filed with SEC urging shareholders to vote for proposal #4 and the vote proposal was approved - 68.52% in favor.

Smith & Wesson (Resolution)

In 2021, shareholders filed a resolution with Smith & Wesson requesting that the company adopt a comprehensive human rights policy, including a due diligence process to assess adverse human rights impacts. Although the company strongly opposed the proposal, a substantial 44% of shareholders supported the resolution at the company’s fall annual meeting. In December the new Corporate Secretary reached out to shareholders to schedule an introductory dialogue, and the ICCR gun safety group met with the company for introductions and to discuss the proposal and why a human rights

policy with due diligence is necessary for any company and will follow up in more detail about the proposal.

This year, DFMS filed a proposal that the Board of Directors adopt a comprehensive policy articulating its commitment to respect human rights, which includes a description of proposed due diligence processes to identify, assess, prevent, and mitigate actual and potential adverse human rights impacts. In a meeting with the company to discuss the human rights due diligence proposal, the company noted concerns about opening themselves up to liability claims if they adopt UNGPs.

Investors said it is possible to have human rights due diligence processes while referencing other standards.

Mastercard (Resolution)

DFMS filed a proposal asking that the Board of Directors conduct an evaluation and issue a report within the next year describing if and how Mastercard Inc. intends to reduce the risk associated with the processing of payments involving its cards and/or its electronic payment system services for the sale and purchase of untraceable firearms. Mastercard has challenged the proposal on the grounds that it deals with matters related to the company's ordinary business operations. This proposal was challenged but the SEC was unable to support the challenge.

Objective – Opioid epidemic: Engage opioid manufacturers and distributors about their corporate policies on the marketing or promotion of drugs that lead to addiction and how the company takes responsibility for these practices.

AbbVie (Dialogue)

To start dialogue with the company, partners filed a governance proposal asking the AbbVie board of directors how it oversees risks related to anticompetitive practices. The company has challenged the resolution and has not come to the table to discuss the issue. After a challenge that was rejected by the SEC, the vote was 33.29% in favor.

Care of Creation

Objective – Water: Engage companies on science-based water stewardship targets and the human right to water, In their operations and their supply chains.

Campbells (Dialogue)

Regarding water risk, Campbells reported it is identifying high-risk commodities/ingredients and high-risk water basins with the goal of setting context-based targets for those at highest risk and is working with the Alliance for Water Stewardship in this effort. The company also reported it is in the process of setting a science-based emissions target, working with a consultant to establish baselines for scopes 1 and 2 and looking for the first time at scope 3 emissions.

Coca-Cola (Resolution)

Engagement with Coca-Cola has focused on plastic waste which impacts water quality. DFMS co-filed a resolution requesting that the Board of Directors issue a report, within one year, describing the potential to reduce dependence more rapidly on single-use plastic packaging by expanding and supporting refillable bottle systems and infrastructure globally. The report should establish uniform companywide metrics for the company's public reporting on refillable use and evaluate opportunities for setting aggressive refillable goals and deadlines. Shareholders withdrew the proposal based on Coca-Cola's recent announced goal to have at least 25% of all beverages globally across its portfolio of brands sold in refillable/reusable glass or plastic bottles, or in refillable containers through traditional fountain or freestyle dispensers by 2030. The company also committed to reporting annually on its progress and to meet with investors to discuss progress. Given these commitments shareholders withdrew the proposal. The company stated it will report annually on its progress toward their goals and continue to meet with shareholders.

Kraft Heinz

DFMS filed a proposal requesting that The Kraft Heinz Company report to shareholders, using quantitative indicators where available, an assessment to identify, considering the growing pressures on water supply quality and quantity posed by climate change, its total water risk exposure, and policies and practices to reduce this risk and prepare for water supply uncertainties associated with climate change.

In a meeting, Kraft began the discussion with a brief background from their new ESG Global Lead Jonah Smith. The conversation thereafter mostly centered around already stated 2020 commitments involving water reduction targets and some various committees work on responsible

water stewardship. However, when asked about committing to conducting a complete agricultural supply chain assessment, they would not commit. They would not state their reasoning until a later email indicating they feel they have done enough and are continuing to work with committees on lowering direct operations water targets but not supply chain. The resolution went to a vote where the vote was 7.32% in favor.

Objective – Climate Change and a Healthy Environment: 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.

Delta Airlines (Dialogue)

Delta reported they are committed to working with the Science Base Target Initiative (SBTi) and set a target. The target is under old SBTi protocol, but company will look at net zero (1.5 degree) protocol once it is available for aviation. Goal includes 10 percent sustainable aviation fuel (SAF) use by 2030 and Delta joined the Race to Zero campaign announced in Glasgow that requires a science-based target for 2035 and a 2050 net zero ambition/pathway. A big hole in plans is scale up of SAF; pilot program with Chevron is part of their plans. 2030 goal for SAF is that half of supply will cut emissions by 85 percent with other half cutting emissions by at least 50 percent. Board has agreed to produce a report on climate lobbying and is regularly briefed on progress toward company's net zero strategy. Company later released its first climate lobbying report.

Chevron (Dialogue)

ICCR partners filed a proposal requesting that the Board oversee the preparation of a report analyzing a critical climate change concern, the reliability of Chevron's methane emission disclosures. The report should: summarize the outcome of any efforts to directly measure methane emissions by the Company; provide investors with insight as to whether there is likely to be a material difference between direct measurement results and the Company's published estimates of methane emissions; assess the degree to which any differences would alter estimates of the Company's Scope 1 emissions.

DFMS participated in a call with company to discuss proposal and the need for more direct measurement of methane leaks and emissions. The company reported working to improve leak management and to implement more direct measurement. The company reports supporting methane regulations to improve practices across the industry. Investors asked if the company is considering joining the Oil and Gas Methane Partnership (OGMP) and implementing its direct measurement protocols; company is looking into it. The company will consider ICCR partner's request for a report. During a Climate Action 100 call with ESG and sustainability team, there was focus on the company's updated climate goals revolving around their competitive advantages,

lower carbon assets, and their investments. The company believes they have a line of sight to reach their goal of reducing intensity, including scope 3 and growing their low carbon renewable fuels business. Ukraine conflict shows that there remains a role for traditional oil and gas, and they plan to stick with fuels even as they work on net zero scope 1 and 2 emissions over time --not pursuing "electrons" in their business. The company will be updating their lobbying information on their website rather than issuing new reports going forward at least a couple of times per year and will issue their new CSR report in May 2022. Uniquely, the Board supported the shareholder proposal in the proxy statement and the vote was 97.97% in favor.

Objective – Climate Change and a Healthy Environment: Engage companies, particularly in the energy and utility sector, to improve public disclosure and transparency in reporting presented by 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 (Resolution)

DFMS filed a proposal requesting that the Board conduct an evaluation and issue a report if, and how, NextEra Energy's lobbying activities align with the Paris Climate Agreement's aspirational goal of limiting average global warming to 1.5 degrees Celsius, and how the company plans to mitigate risks presented by any identified misalignments. A call was held to discuss the proposal. The company reported increased disclosure of trade association memberships, and asked what more investors would want to see. Investors noted that governance structure for lobbying activities and trade association memberships is not clearly stated. Investors are also looking for regular review of association climate positions and action taken on any misalignments with the goals of the Paris Agreement, as well as a clear statement that the company supports the goals of Paris. Resolution withdrawn after company agreed to increase disclosure of trade association memberships and to report on how their lobbying activities on climate issues align with the company's own long range (and Paris-aligned) plans to decarbonize.

During a follow up call with the company to discuss climate lobbying proposal, they described a "terrific" story about its decarbonization efforts and that the company on the record with its support for the climate/energy provisions of the Build Back Better bill. The company reported it doesn't specifically tie public policy efforts to the goals of the Paris Agreement because of the partisan view of it in Florida. Each year their head of government relations reports on their trade association memberships to the CEO and the board is involved in annual review of spending. The company believes the Chamber is improving on climate issues and that other trade associations are well-aligned with climate policies and goals of company. During another call there was discussion on terms for a possible withdrawal including an online statement of their climate policy, an explanation of the board's role in reviewing policy related spending and positions, and a review of trade associations. The Company later announced plans to reach "real" net zero emissions by 2045. The company claims that all other industry pledges include carbon offsets, making their pledge the only

real net zero pledge in the industry. Using NextEra Energy's 2005 standard adjusted baseline, the company now plans to reach a carbon-emissions-reduction rate of 70% by 2025, exceeding its previous commitment. Under its Real Zero goal, the company would improve that carbon emissions reduction rate to 82% by 2030, 87% by 2035 and 94% by 2040 before striving to achieve Real Zero by no later than 2045.

UPS (Resolution)

DFMS filed a proposal requesting that the Board conduct an evaluation and issue a report describing if, and how, UPS's lobbying activities align with the Paris Climate Agreement's goal and how the company plans to mitigate risks presented by any misalignment. The company responded by noting their current disclosure of political and lobbying spending and their view that their level of disclosure is adequate to assure investors that they are supportive of climate action.

During a call with the company to discuss shareholder proposal, the company stated it believes they provide sufficient information on their lobbying activities, and they outlined their climate commitments. Shareholders explained that this report would give investors assurance that the company's lobbying activities align with its ambitious, Paris-aligned, climate goals. The company joins trade associations for many reasons, and despite the negative climate positions taken in the past by groups such as the Chamber of Commerce, UPS has been able to get supportive policies where it needs them "those positions haven't slowed us down." The vote was 33.23% in favor.

Valero (Resolution)

DFMS filed a proposal requesting that Valero issue a report within a year, and annually thereafter, that discloses near- and long-term GHG gas reduction targets aligned with the Paris Agreement's goal, and a plan to achieve them. Reporting should cover the company's full range of operational and supply chain emissions. Investors met with the company to discuss the shareholder proposal, but the company was not comfortable sharing plans where it does not have a line of sight to meet. Investors noted that many companies are sharing long-term ambitions and noting where there are current gaps in technology as a way to show commitment to making the transition where not all details are yet known. Investors also noted this was a Climate Action 100+ engagement with Valero company on the company's lack of long-term emissions targets and the company's plans to increase its production of biofuels. The company stated it doesn't want to risk "greenwashing" in setting aspirational long-term targets and believes that some of its peers are doing so. Valero is spending about 60 percent of their growth capital on expanding their capacity to produce biofuels and is the largest US producer (includes ethanol as well as biodiesel), but they are expanding because they see the market potential in these products. Investors asked about reporting of scope 3 emissions, and they noted that they lack control over product use and emissions are hard to estimate.

Company presented its case for a vote against ICCR partners proposal to the Climate Action 100+ engagement group. They believe proposal is trying to "cookie cutter" the company into a business

strategy: they believe that their fossil fuel business is resilient, plan to assess it under the IEA Net Zero scenario this summer in an addition to their climate report. They believe that any long-term target risks greenwashing, which they try to avoid. Investors noted that we understand long term targets are aspirations, not specific road maps, but show company recognizes long-term reality. The corporate secretary made the remarkable claim that company "was aligned with Paris when Paris was being written." The vote was 47.11% in favor.

During a follow up call with corporate secretary and head of ESG to discuss the proposal, the company announced that they will be updating its climate report in 2022 to include a full analysis using the IEA Net Zero scenario but are still not at a point where they can update their targets or report scope 3 emissions. They note that 70 percent of their growth capital expenditure is going to their renewables business and that they have a major investment in a CCS project for their Gulf Coast refining operations. As is typical, the company made the argument that they are low-cost operator, have already sold or retired their least efficient assets, and expect to be refining petroleum products as "last company standing" into mid-21st-century.

Objective – Climate Change and a Healthy Environment: Engage financial institutions to ensure commercial lending and investment policies address socioeconomic and environmental concerns, particularly climate change, water stewardship, pipelines, financing in their lending practices.

American International Group (Dialogue)

ICCR partners filed an early resolution asking for climate lobbying disclosures. DFMS joined in dialogue with the company to discuss what investors are looking for in a report, highlighted key differences between political spending reporting (note that company has paused contributions indefinitely) and lobbying and why this is seen as a risk and a key metric for companies. After the call investors shared resources and examples with the company. The resolution was later withdrawn because company has agreed to issue a climate lobbying report in 2022. Company shared their plans to issue a report in 2022 that includes a full list of their trade association and an evaluation of how their positions on climate issues align with the goals of the Paris Agreement, plus new disclosures regarding their governance of lobbying activities and trade association memberships. Their first climate lobbying report was issued in May 2022.

Objective – Climate Change and a Healthy Environment: Engage companies to ensure positive community impact of company operations on society, local economy and environmental concerns are appropriately assessed and transparently reported (sustainability reports) including environmental justice concerns and the impacts on the most vulnerable such as: women, indigenous persons, and people who are impoverished.

Chewy (Dialogue)

The company was asked to start providing a sustainability report and disclose information on ESG issues. The letter included reasons to disclose, peer analysis of disclosing, and frameworks to view for proper reporting techniques.

Corporate Governance and Accountability

Objective – Diversity on Corporate Boards of Directors: Engage companies to address board diversity to include women and people of color. Engage companies to address income inequalities, racial disparities, and other human capital issues to promote a just society.

Elevance Health (fka Anthem) (Resolution)

DFMS filed a proposal urging Anthem’s board of directors to oversee a third-party audit which assesses and produces recommendations for improving the racial impacts of its policies, practices, products, and services, above and beyond legal and regulatory matters. The vote was 41.24% in favor.

Johnson & Johnson (Resolution)

DFMS filed a lobbying alignment resolution asking for a third-party report on how JNJ’s lobbying activities align with the company’s position on Universal Health Coverage. The company. Investors will send them examples from Bayer and Shell. The company indicated they may be willing to look at interim measures but are unlikely to commission a full report. They believe their current disclosure is more than sufficient. Dialogue will resume after they have reviewed the example reports. The vote was 62.64% in favor.

2023 Engagements

The Domestic and Foreign Ministry Society of The Episcopal Church (DFMS) advocacy work consists of multiple engagement methods including company dialogues, filing resolutions, and sending letters. For the 2023 proxy year, DFMS conducted 48 engagements at 43 different companies, and filed 15 resolutions. This report provides a summary of activity in the 2023 proxy year, including those actions taken by Mercy Investment Services, Inc. and Heartland Initiative, our contractors for socially responsible advocacy efforts.

Human Rights

Objective–Sex Trafficking: Engage companies on with best practice standards to mitigate labor trafficking child and women sexual trafficking. Engage companies to address online child sexual exploitation.

Delta Air Lines (Dialogue)

Held dialogue with Delta to discuss its ongoing response to the Covid-19 pandemic and how the company supports employee's holistic health and well-being. Throughout the pandemic, Delta provided close to two million free tests to associates and their families and helped provide over 500k vaccines to staff and communities. Delta reported that the company continues to support its associates by providing free Covid testing, free masks, and up to 10 days of Covid paid leave if an employee contracts the virus. Delta noted that about 94% of its workforce is fully vaccinated and it continues to track infection, hospitalization, and vaccination rates. In 2022, Delta created the Flourishing Index Survey and conducted over 200 interviews across the Company to better understand how to provide equitable benefits and support worker well-being. In response to this feedback, Delta is expanding the number of free counseling sessions from 7 to 12 and in 2023, will partner with a concierge provider to help staff navigate their healthcare plans, benefits, and billing. Delta confirmed that all benefits are available to part- and full-time associates, as well as Ready Reserve employees.

Delta announced that its raising employee pay an additional 5% effective April 1, 2023. The pay raise applies to ground workers and flight attendants.

In July 2023, shareholders had a call with Delta to discuss the Company's work on human rights in the supply chain, trafficking prevention, DE&I initiatives, and worker well-being. Delta reported that since it began its trafficking prevention, the company has trained over 100k current and retired employees with 60k active employees who are currently being trained. Delta continues to work with Wellspring Living to provide apprenticeship opportunities to trafficking survivors and it is exploring partnering with other airlines to help relocate labor trafficking survivors as well. The company began using EcoVadis in 2022 to assess Tier 1 suppliers on social and environmental factors, including human rights. To date, about 280 suppliers have undergone an assessment and about 80% received a good rating, 19% need improvement, and 2% do not have any policies in place. Delta reported plans to do these assessments yearly to gather data and identify trends, and the next target group will be vendors with manufacturing suppliers. It switched to Gap/GPS Apparel to source its uniforms and has embedded human rights expectations into the contracts.

On DE&I, Delta reported using an equity lens and closing representation gaps, rather than just focusing on specific percentage representation targets. It is developing a 2023 DE&I strategy that will

include a focus on Hispanic representation and addressing the challenges for closing the representation gap for Black talent in leadership positions. The company continues to evaluate incorporating DE&I metrics into executive compensation, but said the metrics are not the most useful lever for driving change in the organization now.

Finally, the company discussed employee well-being noting that it is using the MIT Living Wage Calculator to evaluate its pay scale structure and identify equity gaps which resulted in the implementation of a higher cost of labor pay-scale for locations with higher costs of living and labor. Delta is conducting an annual assessment of wages and the pay-scale to identify and remediate any gaps. Additionally, Delta adapted the Flourishing Index to its own employee survey and will benchmark year-over-year progress in terms of participation and response trends. In the first year, financial wellness was the lowest scoring area, so Delta invested resources to improve its workers' financial wellbeing. It noted that employees use, on average, 8-10 of their free mental health visits per year and all U.S. employees have access to the backup care program.

United Airlines (Dialogue)

Dialogue with United Airlines covered updates on the company's trafficking prevention training, implementation of its human rights policy, and DE&I commitments. The company reported it has trained over 50,000 employees in trafficking prevention and continues to engage with the Department of Homeland Security on best practices. In the area of human rights in the supply chain, United reported it has embedded expectations on human rights into its standards contract clauses and the Request for Proposal (RFP) process with suppliers. The company is evaluating implementing a third-party supplier risk management process that would include a compliance and audit process. On DE&I, United noted it is trying to take a data-informed approach to setting goals and measuring progress. The Company currently focuses on building diversity in its pilot and technician training programs, with the goal that by 2026, one thousand technicians will go through the apprenticeship program and at least 50% will be women or Black, Indigenous, and People of Color (BIPOC).

United Airlines has also reported it has embedded its Human Rights Policy Statement into its annual ethics training. The company stated it has added provisions in supplier contracts to address human rights risks (e.g., debt bondage, ethical recruitment processes, no recruitment fees) and site visits to supplier facilities are part of the vetting and compliance verification process.

This year, United Airlines released its 2022 ESG Report. On human rights, the report notes that, since 2018, United has trained over 52,000 employees on human trafficking awareness and prevention, and that it has established procedures in the procurement process to ensure suppliers comply with regulations and its Human Rights Policy. Unfortunately, the report does not include new disclosure about the company's human rights due diligence efforts, and the Anti-Slavery & Anti-Human Trafficking Statement are from 2021.

On DE&I, the report highlights that over 90% of new-hire interview slates for management and administrative roles in 2022 contained diverse candidates, and the company has achieved near-perfect pay equity for employees of all genders and races. United has doubled its diverse supplier spending year over year with the goal of doubling it again in 2023. United was listed in the Disability Equality Index's 2022 list of best places to work for disability inclusion. Finally, the company is disclosing its Equal Employment Opportunity (EEO-1) data and has committed to publishing an annual EEO-1 report.

Redacted (CONFIDENTIAL Dialogue)

Dialogue with [redacted] to discuss the company's ongoing work to identify and prevent child sexual abuse material.

Meta Platforms, Inc. (Resolution)

DFMS filed a resolution requesting that, within one year, the Board of Directors adopt targets and publish annually a report assessing whether Meta Platforms, Inc. has improved its performance globally regarding child safety impact and actual harm reduction to children on its platforms. The resolution received 16.28% of the vote at Meta's annual general meeting.

In addition to the vote, DFMS partners attended the annual general meeting and asked a question regarding how the Company is incorporating considerations of child rights and potential risks, including online sexual exploitation, into the design and implementation of the Metaverse and Meta's virtual reality platforms and spaces. Unfortunately, the question was not addressed by the Meta during the Q&A session.

Visa Inc. (Dialogue)

DFMS participated in multiple dialogues with Visa discussing policies and risk management systems in relation to child sexual exploitation and child sexual abuse material. Visa's business model is a network that connects cardholders to merchants through financial institutions; these institutions, or 'acquiring banks,' are Visa's clients and are subject to Visa's rules and standards regarding high-risk transactions. These include all acquiring banks in Visa's network are now expected to conduct due diligence on their merchants, and if an acquiring bank engages in high-risk transactions, such as adult entertainment, they must also register with Visa for a high-risk liability license. Visa then uses internal quality control and monitoring systems to flag any potential illegal activity. If illegal activity, such as child sexual abuse material, is found, Visa investigates and implements a remediation process on the acquiring bank that could include applying financial penalties, requiring an independent review/audit of risk controls, non-compliance assessment, or termination of the business relationship if remediation is not possible. Visa recently amended its policies with acquiring banks to require that merchants in the adult entertainment sector verify age and consent before content is produced or uploaded, implement a content review process, and implement a

grievance/complaint mechanism. Because adult entertainment is legal, Visa noted the challenge of needing evidence that illegal activity has occurred before it can act with the acquiring bank.

In a follow up dialogue, Visa continued the discussion on its due diligence processes to ensure its credit cards and services are not used to purchase and perpetuate child sexual exploitation online. As previously discussed with Visa, the company updated its merchant acquirer guide in August 2022 to strengthen expectations, including that the acquirers will require merchants to verify age and consent in the adult entertainment sector, as well as to implement grievance mechanisms for anyone depicted in child sexual abuse material, or other non-consensual material. To verify the acquirers' compliance with this new guidance, Visa has an audit control process that includes reports from 'secret shopper' companies that flag potential violations. Visa also works closely with global law enforcement agencies and non-governmental organizations, including the National Center for Missing and Exploited Children and the National Center on Sexual Exploitation (NCOSE), to help flag issues. If Visa receives information indicating a potential violation, it investigates the acquirers, which could include suspension or termination. The company's Audit & Risk Committee has oversight at the board level and receives regular updates from the Chief Risk Officer. Visa also shared that effective March 2023, it will join the Internet Watch Foundation, a multi-stakeholder initiative focused on ending child sexual exploitation online.

Later in the year, Visa emailed investors and responded to some outstanding questions from shareholders in the last dialogue with the company. The email noted that Visa joined the Internet Watch Foundation (IWF) in March and that members of the company's risk team are engaged with IWF. It also included a summary of the changes made to the Visa Integrity Risk Program that require acquirers and their merchants to verify legal age and consent of anyone in the adult entertainment industry, implement monitoring mechanisms for uploaded and live-streamed content, and apply grievance and reporting systems to take down and resolve any noncompliant contact.

In Visa's 2022 ESG Report, investors noted the inclusion of a section on transaction integrity with a high-level overview of the company's Integrity Risk Program that establishes controls, requirements, and compatibilities to deter, detect, and remediate any non-compliant transactions across Visa's network. The report does not include any detail on the updates that Visa made to strengthen its acquirer standards to help prevent child sexual abuse material and online sexual exploitation and does not detail Visa's participation in the Financial Coalition Against Child Sexual Exploitation.

Objective – Labor Trafficking in Workplace & Supply Chain: Engage companies on efforts to ensure compliance with human rights standards in their own workforce, supply chains, including outsourced labor brokers, requirements in subcontractor contracts, compliance audits and performance/improvement measurement. Address a focus on mental health issues.

Kroger (Dialogue)

ICCR partners filed a resolution with Kroger asking that the Board publish a report on whether the company participates in compensation and workforce practices that prioritize company financial performance over the economic and social costs and risks created by income inequality and racial and gender disparities. The company did not speak with investors and the resolution was omitted from Kroger's proxy after the Company won an SEC challenge.

A March press release indicated Kroger will invest an additional \$770 million in its associates in 2023. This investment will be used to raise average hourly wages, improve health care options, build new training and development opportunities, and expand other benefits and services for associates.

DFMS participated in a May 2023 call with Kroger regarding the Company's progress to survey suppliers and set a sustainable agriculture commitment. Investors asked about Kroger's responses to recent reporting about the prevalent use of migrant child labor in the U.S., especially in the food processing in manufacturing sectors. The company is working with the Equitable Food Initiative and Ethical Charter on Labor and Human Rights Standards for the produce sector, which should be rolled out later in 2023. The company noted that it conducted a Human Rights Impact Assessment (HRIA) of its mixed greens suppliers in California to identify human rights risks and recommendations for improvement. More information on the HRIA will be disclosed in the Company's next ESG Report.

Kroger received the 2023 Gold Bell Seal for Workplace Mental Health from Mental Health America. The Bell Seal is a certification that recognizes employers who create mentally healthy workplaces for all its associates and Kroger received this award based on its strong wellness programs, including benefits and perks to support associates' mental health.

Procter & Gamble (Dialogue)

DFMS joined the work of the CCLA (Church of England investment management) Mental Health Initiative that sent investor letters to global companies, including Procter & Gamble, based on the results of the 2022 Global 100 Mental Health Benchmark. The letter outlines the business case for providing mental health benefits to employees and asks companies to implement effective management systems, including publicly acknowledging workplace mental health as an important issue, signal board and senior management commitment to promoting mental health in the workplace, publish a commitment and set objectives to improve workplace mental health, and report annually on progress.

The Company responded in writing to the investor letter regarding its ranking in the 2022 Global 100 Mental Health Benchmark. The company outlined its approach to mental health as part of its broader wellbeing business strategy, "Be at my Best." Through its Vibrant Living Program, the Company provides employees benefits and services on fitness, nutrition, mental and emotional resilience, and health and education training. Procter & Gamble has a personalized Wellness Assessment to help

guide employees on their health and wellbeing journey, Global Standards for Employee Health & Wellbeing, and a Network of Mental Health First Aiders who are employees trained to provide help and support on issues of mental health and wellbeing. The company noted that it has a Corporate Wellbeing Strategy supported by a committee of senior leaders including Wellbeing Core Standards. Proctor & Gamble is investing in training to build manager capability for addressing mental health issues and supporting employees.

Elevance Health, Inc. (Resolution)

DFMS co-filed a resolution urging Elevance Health's Board of Directors to oversee a third-party audit which assesses and produces recommendations for improving the civil rights impact of its policies, practices, products, and services. In a call with the Company, investors learned that Elevance Health has reached out to the Business for Social Responsibility (BSR) to do a health equality materiality assessment. Investors discussed the scope, shareholder involvement, and other specifics of what that assessment would entail. Shareholders reached an agreement with the Company, so the resolution was withdrawn.

A later press release from the Company about the Racial Equity Audit discussed the scope, partnerships, and auditor.

Objective – Conflict Affected and High-Risk Areas: Engage companies with direct or value chain activities in conflict-affected and high risk areas 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 peoples). impacting Indigenous peoples. Develop Human Rights Screen for Israel/Palestine and conflict affected areas such as Burma/Myanmar, Russia, XUAR, Sudan etc.

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

ABB Ltd. (Dialogue)

Heartland reported this year that after several unsuccessful attempts to engage the Company in dialogue about the Occupied Palestinian Territories (OTP) as well as other conflict-affected and high-risk areas, the proposed engagement should end. That said, ABB Ltd. did reach an agreement in September 2022 to sell its remaining stakes in Hitachi Energy, which owns and operates the solar energy projects in Moroccan-occupied Western Sahara.

Booking Holdings, Inc. (Dialogue)

Heartland reported engaging Booking Holdings on its human rights and material risks in the Occupied Palestinian Territories and other conflict-affected and high-risk areas with the lead, Wespath. After promising to start the development of a new global human rights policy, led by consultant Business for Social Responsibility (BSR), the company has reneged on several key commitments, including removing “human rights risks” from certain “controversial” geographies; abandoning international legal terms (e.g., occupied territory); and providing a list of what the company considers conflict-affected and high risk. Subsequent conversations with Booking Holdings staff and the lead failed to address investor concerns regarding changes to the partially released public policy or the state of the “evolving” policy. Communication with the company has broken down. As a result, Wespath is planning to file a shareholder resolution that will seek to address deficiencies in Booking Holding’s global human rights policy and corresponding set of practices. Wespath will work with coalition members to build support for this resolution.

Booking Holdings has added travel warnings to listings in the Occupied West Bank. The new alert urges customers searching for rentals in Israeli settlements to review their government’s travel advisories before booking in the area. The warning also appears for a few other conflict-ridden regions around the world, including the separatist Nagorno-Karabakh region partially occupied by Azerbaijan.

Chevron Corporation (Dialogue)

Heartland reported meeting with Chevron in the fall of 2022 to discuss the company’s ownership of 15% of the Caspian pipeline, given that 13% of the pipeline oil is Russian. The company stated it is working with BSR and Maplecroft on tools for conflict risk reviews. Although exploring a different route is a possible outcome, it is extremely hard geographically and expensive for Chevron to build. Chevron stated it is seeking to look at a more systemic approach to the region.

Investors exchanged emails with Chevron concerning the militarization around the port of Novorossiysk where the CPC pipeline ends. The company feels there is good freedom of movement and transit, yet media reports missiles being launched from that area. Additional questions have been proposed for discussion around risk thresholds for suspension of operations and financial implications of the payments from the pipeline.

Shareholders wrote Chevron an email asking it to evaluate the ability to ensure facilities are not used in war crimes by the Russian military, oil being transported by the pipeline is not involved in war crimes, and how it is working with business partners to adhere to international human rights principles. The company responded and said that its oil is not involved, and it works to apply laws and regulations.

With DFMS as lead, investors continue to engage with the company given its multiple conflict-related risks including the sale of shares in the Yadana pipeline in Myanmar to Canadian company MTI. While

the coalition developed a positive working relationship with Chevron staff, the company has failed to address the original shareholder resolution, namely the development and implementation of policy, practice, and governance related to conflict- and human rights-based risks. DFMS and their partners plan to file a shareholder resolution focused on the company's conflict-related and human rights risks in Angola, China, Iraq, Nigeria, Saudi Arabia, Venezuela, and in the Eastern Mediterranean and will seek to build a broader coalition of investors to support the effort.

Cisco Systems (Dialogue)

DFMS joined a coalition led by Wespeth to engage Cisco Systems concerning its ongoing operations in Russia and value chain partnerships with other rights-violating states. Topics include its role in developing IT infrastructure in occupied territories, and its exposure to forced labor in Xinjiang Uyghur Autonomous Region, China.

Heartland reported a first and positive call with Cisco's business and human rights manager in July 2023 concerning the Company's lessons learned from the Russian invasion of Ukraine and its ongoing human rights risks related to partnerships with rights-violating states (e.g., Saudi Arabia, UAE), development of ICT infrastructure in occupied territories (e.g., OPT, Golan Heights, Northern Cyprus, South Ossetia/Abkhazia, Transnistria), and forced labor in its supply chain (e.g., via companies in Xinjiang Uyghur Autonomous Region). Following this preliminary call and Cisco's staff commitment, a series of follow-up calls are being planned with the next one taking place in the Fall of 2023.

Expedia Group (Dialogue)

For two years, DFMS has been working in a coalition with the Presbyterian Church (USA) on an engagement with Expedia Group concerning the company's conflict-related risk in the Occupied Palestinian Territories and other areas of conflict. As with Booking, Expedia has hired BSR to develop a global human rights policy and plans to release it this year.

Expedia staff reported that BSR's human rights saliency assessment prioritized two salient issues for the Company: human trafficking, and operations in conflict-affected and high-risk areas. Since this initial process, the investor coalition led by Presbyterian Church (USA) has held two meetings with company representatives. However, unlike Booking, Expedia has not shared drafts of the new global human rights policy with investors, and the company remains unsure of when it will be published, leading to increased concerns that the company may pursue and release an inadequate policy. The next call with Expedia is planned for Fall 2023.

General Mills (Dialogue)

In a dialogue with General Mills, investors discussed the sale of joint venture at the Atarot plant. The Company reports that none of its products will be sourced from the Atarot Plant and future products from the plant will not be marketed under the Pillsbury name. DFMS has worked with Friends

Fiduciary to engage General Mills on its direct and value chain risks in conflict-affected and high-risk areas, primarily in Southeast Asia and the Occupied Palestinian Territories.

Following the sale of General Mills' factory in the Israeli-occupied West Bank and due to staff capacity limitations for the lead investor (Friends Fiduciary) there has been a decision to sunset this engagement.

Heidelberg Materials (f/k/a Heidelberg Cement) (Dialogue)

Heartland reported that the engagement resumed after the coalition lead, Wespeth, filed a shareholder countermotion at the Company's annual general meeting in the summer of 2021. Issues of particular concern to the investor coalition, including operations in the Occupied Palestinian Territories, Western Sahara, Indonesia, and Ukraine, have been raised at successive annual general meetings by the coalition's German partner, Ethical Shareholders Germany. In follow-on conversations with the company, investors met with the new human rights program officer (a former jurist from Colombia with extensive human rights expertise), discussed the company's reporting requirements under the new German Supply Chain Act, and explored ongoing concerns, including the pending sale of the Nahal Raba quarry in the Occupied Palestinian Territories, the expansion of operations in Western Sahara, and the reticence of the company to release its environmental and social impact assessment report to stakeholders in Indonesia. Another conversation is planned for Fall 2023.

JPMorgan Chase (Dialogue)

After an initial letter requesting dialogue, JPMorgan Chase agreed to meet with investors. Topics included trying to better understand how the Company conducts due diligence in conflict-affected areas, how it is managing Russian president Putin's Partial Mobilization Order, and what post-war plans it has for Ukraine. The Company indicated it has procedures, but none are specific to conflict-affected areas, nor are they publicly displayed.

During a meeting, JPMorgan Chase noted that it is taking a "fresh look" at human rights and the specific concerns of conflict zones. It is looking to do a human rights saliency mapping project to learn, as it has with climate lending. The earlier letter to shareholders noted that the Company is aware of the geopolitical risks threatening the business and that it aims to look deeper into these risks. However, it is not clear if the Company will conduct an internal or external review. The Company will get back to investors on their questions concerning staffing in Russia and agreed to meet again.

Investors led by Miller Howard sent a follow-up letter asking for calls twice a year and sent resources and questions for the next dialogue focused on both board skills in conflict-affected and high-risk areas and the use of outside experts to assess those situations.

Keysight Technologies (Resolution)

DFMS filed a shareholder resolution with Keysight Technologies following the Russian invasion of Ukraine, highlighting concerns over the Company's sale of deep packet inspection equipment used to surveil and censor the internet to the Kremlin as well as electronic warfare simulation software to the Burmese and Chinese governments. In exchange for a withdrawal of the resolution, the company agreed to: (1) update its Human Rights and Labor Policy to address human rights impacts associated with customer use of Keysight's products and services including access to remedy; (2) train relevant staff on end use risks and basics of human rights due diligence in sales; (3) add human rights review to the customer screening process; (4) if any red flags are identified as a result of the human rights customer screening process, a steering committee will review to determine course of action (e.g., approve the sale, approve the sale with conditions, reject the sale, suspend business, stop business); and (5) agree to two calls with the investor coalition in 2023 to discuss progress.

The coalition had its first update in July 2023, and the company detailed specific changes to its policy, reporting on external experts that were brought in to assist in the process, training programs conducted to date, and steps taken to integrate human rights into the company's know-your-customer due diligence process.

Siemens (Dialogue)

Heartland reported it will sunset this engagement due to changes to the corporate structure of the company. A dialogue was originally proposed prior to Siemens split with Siemens Energy, which is exposed to several conflict and human rights related risks due to its operations and relationships with Western Sahara, Russia, Golan Heights, China, and other conflict-affected and high-risk areas.

TripAdvisor, Inc. (Dialogue)

Heartland reported that of the three parallel engagements with online tourism companies, TripAdvisor is the least robust and most disappointing. Unlike Booking Holdings and Expedia, the Company hired a marketing firm (versus an organization with expertise in business and human rights) and developed a generic and substandard human rights "policy."

Following the release of Expedia's global human rights policy, DFMS will lead a coalition of investor partners to reach out to the company to discuss how its current policy compares to its peers with an emphasis on deficiencies in conflict-affected and high-risk areas and related risk prevention and mitigation. Should TripAdvisor remain unresponsive, DFMS and its partners will consider filing a shareholder resolution in 2023.

Health and Health Care

Objective – Opioid Epidemic: *Engage opioid manufacturers and distributors about their corporate policies on the marketing or promotion of drugs that lead to addiction and how the company takes responsibility for these practices.*

AmerisourceBergen and Cardinal Health (Dialogue)

The Investors for Opioid and Pharmaceutical Accountability’s (IOPA) Opioid Risk Disclosure Toolkit was sent to both AmerisourceBergen and Cardinal Health for input. The company did not respond but DFMS partners have decided to sunset both the AmerisourceBergen and Cardinal engagements due to the disbandment of the IOPA and the termination of the risk-management workstream.

CVS Pharmacy, Inc. (Dialogue)

Despite investors’ hopes for further dialogue, DFMS partners have decided to sunset this engagement due to the disbandment of the IOPA and the termination of the risk management workstream.

Objective – Gun Safety: *As a public health issue, engage gun manufacturers to adopt more smart technologies for weapons and 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 industries such as credit card companies, shipping companies, and financial institutions on their impact on the epidemic of gun violence in the United States.*

Sturm, Ruger & Company (Resolution)

DFMS filed a shareholder resolution with Sturm, Ruger & Company urging the Board of Directors to oversee a third-party Human Rights Impact Assessment (HRIA) which assesses and produces recommendations for improving the human rights impacts of its policies, practices, and products, above and beyond legal and regulatory matters.

During a call with the company regarding the marketing resolution, investors reiterated their hopes that the company would conduct the HRIA for which shareholders won a majority vote in FY22. The General Counsel, who was present at the meeting, would not speak on the HRIA, citing fair disclosure and confidential information, characterized as forward-looking statements. Shareholders know nothing regarding the resolution other than that the issue was in front of the board. With regards to the marketing resolution, the General Counsel pointed investors towards the Gun Safety Report—

which was the report resulting from shareholders' first successful resolution—for their edification on the company's responsible practices. Based on this report, the company's general counsel sees the marketing resolution as inappropriate and noted that the company's small legal team has limited capacity to deal with shareholder resolutions. Despite the company sending over marketing materials post-meeting, investors decided to not withdraw. The resolution received 26.52% of the vote at Sturm, Ruger's annual general meeting.

Smith & Wesson Brands, Inc. (Resolution)

Last year, shareholders filed a resolution with Smith & Wesson Brands, Inc. requesting that the Board of Directors adopt a comprehensive policy articulating its commitment to respect human rights, which includes a description of proposed due diligence process to identify, assess, prevent, and mitigate actual and potential adverse human rights impacts. The resolution received 41.77% of the vote at the September AGM.

This year, DFMS filed a resolution directing Smith & Wesson Brands, Inc.'s Board of Directors to oversee an independent third-party Human Rights Impact Assessment (HRIA) to assess and produce recommendations for improving the human rights impacts of its policies, practices, and products, above and beyond legal and regulatory matters. Investors had a call with the company to discuss the HRIA resolution and the corporate secretary asked shareholders for examples of companies that would conduct such an assessment, as well as completed assessments Smith & Wesson Brands, Inc. could look at. Investors shared these lists after the meeting.

Mastercard Inc. (Dialogue)

In the Fall of 2022, Mastercard and other payment networks announced that they would adopt the International Organization for Standardization's (ISO) new Merchant Company Code (MCC) for gun sales. This past March, investors learned that Mastercard, along with other payment networks, would pause implementation of the new MCC for gun merchants. According to the Company, it did this "due to proposed legislation in several U.S. states related to ISO's newly issued MCC for gun and ammunition shops."

So far, seven states have banned the use of MCC code through legislation. Using MCC for firearms prevents legal risks for Mastercard and customers. The Company has adopted a "wait and see" approach with the legal battles to come. Investors will circle back on this issue in future dialogues.

Care of Creation

Objective – Water and Healthy Communities: *Engage companies on science-based water stewardship targets and the human right to water, in their operations and their supply chains with a focus on the Ceres 'Valuing Water' initiative.*

Campbell Soup (Dialogue)

Dialogue with Company included discussion of its recent climate scenario analysis, which considers drought and precipitation. The company reported that it has not fully integrated information from its water assessment into an action plan but continues to push ahead on direct and manufacturing water goals. The Company reported starting to focus on integrating its science-based target as a priority in ESG reporting while also hiring a full-time supply chain lead on its ESG team who will address water in addition to climate change. Campbells has conducted a 2022 Supply Chain Water Assessment and is taking that information to suppliers to implement changes needed.

Constellation Brands, Inc. (Dialogue)

In a dialogue with Constellation, investors learned it will be conducting a direct operations water risk assessment to assess 10-12 facilities. Additionally, the company reports that between fiscal year 2023 and fiscal year 2025, it has a target to restore approximately 1.1 billion gallons of water withdrawals from local watersheds, while improving accessibility and quality of water for the communities where it operates. The company announced financial support to a two-year commitment to The Nature Conservancy to preserve watershed areas in California. With regards to the water risk assessment, Constellation notes it is in the initial stages of engaging suppliers to help understand its practices and risks and that it will set targets based on that assessment of its supply chain risk.

Coca-Cola (Dialogue)

Engagement this season with Coca-Cola included a meeting where the company discussed adding new sustainability goals to long-term incentives in executive level pay, including metrics for its water targets, world without waste (plastic reduction program) and a science-based climate target. The Ceres Valuing Water Initiative is coordinating the next steps for an engagement team for Coca-Cola.

Coca-Cola released its 2022 ESG Report in which it stated a goal of achieving 100% regenerative water use across its 175 facilities identified as high levels of water stress by 2030. Additionally, Coke stated its goal of returning two trillion liters of water to nature and community globally by 2021 and 2023. In 2022, the Company returned 159% of water used in 2022 as well as joined the Open Call to Accelerate Action on Water, a collective action to achieve positive water impact in 100 vulnerable

water basins by 2030. The Company has also helped develop a standardization methodology to measure the benefits of Water, Sanitation and Hygiene (WASH) projects and guidance to turn commitments into integrated business practices.

Objective – Climate Change and a Healthy Environment: *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 (Resolution)

Engagement with Ameren included a resolution requesting a report disclosing Scope 1 and 2 operational greenhouse gas targets in the short, medium, and long term aligned with the Paris Agreement’s goal of maintaining global temperature rise at 1.5 degrees Celsius. Since filing the resolution, investors met with Ameren to discuss their climate lobbying expectations and the Scope 1 and 2 resolutions as well as the company’s scope 3 emissions. Although the company has increased the ambition of its targets and is in the process of developing a new integrated resource plan, the resolution asks Ameren to increase its ambition in relation to peers’ accelerating coal retirements. The resolution was challenged and denied by the SEC. The lead filer submitted a proxy memo urging other Ameren shareholders to vote for the GHG Report resolution.

In a follow-up call Ameren noted that it believes its current targets are 1.5C-aligned but investors reminded the company that electric utilities need to be the first movers to reduce emissions and that the company’s goals are lagging its peers. The company sees transmission shortfalls and a need for upgrades as a barrier to greater adoption of renewables.

The resolution received 13.79% of the vote at Ameren’s annual general meeting. The Climate Action 100+ initiative recently announced that Ameren will be added to the initiative as it begins its second phase.

Chevron Corporation (Dialogue)

In the spring of 2023, investors had a call with Chevron to discuss new energy sources, emissions targets, and climate disclosure. Shareholders asked if the Company was considering an increase in capital expenditure for new energy sources. Chevron’s current spending on new energy sources is about 10% and is giving priority to low-carbon spending as well as return on investment—which is problematic for less mature energy sources. Much of Chevron’s spending goes toward lower carbon oil and gas production, such as assets purchased from Noble. The company is looking to expand efforts in carbon capture; its current spending is low but the company thinks that carbon capture will have a big impact. Chevron did not meet its emissions targets last year and reports ramping up efforts this year to drive down the carbon intensity of assets it operates and has an equity stake in. On disclosure,

it is waiting to see what the SEC will require. The company is currently in conversation with Oil and Gas Methane Partnership 2.0 about concerns with its framework but is still working independently to increase direct measurement of methane emissions.

The meeting ended with the company adding that it does not plan to increase reporting on climate lobbying because it does not think investors need the information and large investors are not asking for such reporting. One of the Climate Action 100+ leads for Chevron filed an exempt solicitation with the SEC urging fellow shareholders to vote against key directors due to the company's lack of response to the 2021 majority vote on climate lobbying, resulting in a slight drop in support for those directors.

Delta Air Lines (Dialogue)

The Climate Action 100+ engagement team met with Delta to discuss implementation of new science-based targets, investments in sustainable aviation fuel, company lobbying activities and the impact that the Inflation Reduction Act (IRA) may have on the company. Delta needs to increase its use of Sustainable Aviation Fuel (SAF) from the current level of five million gallons per year to three billion gallons by 2030 to meet its goal of 10 percent usage. This is a huge increase, and the IRA will help, but the company notes that the IRA will not support supplies in the long term. The company continues to see the "glide path" in its 2022 ESG report as its pathway to net zero and includes its mid-term science-based target. Investors requested more details about how and where the company is spending additional capital expenditures to support its plans. Investors asked if there will be update of their 2022 climate lobbying report in the new year and were assured that it will happen.

Marathon Oil Corporation (Resolution)

DFMS filed a resolution requesting that Marathon Oil issue a report analyzing a critical climate change concern, the reliability of its methane emission disclosures. The resolution was withdrawn after Marathon agreed to provide new disclosure and commentary in its forthcoming Sustainability Report, which will be published by the Fall of 2023 and will outline its efforts to reduce methane emissions intensity and the reliability of its methane emission disclosures. Investors felt that this report is consistent with the resolution.

Phillips 66 (Dialogue)

The company reached out to investors to update them on ESG work and its sustainability platform. During the dialogue, investors called for increased information on methane disclosure.

DFMS met with a member of the Phillips staff. Investors discussed the need for authentic community engagement in South Louisiana and elsewhere. The company indicated that it believes the measures it takes are sufficient and investors reminded the staff that the community disagrees. It is aware of the beginning of a broader engagement in Mossville, Louisiana which it will be part of. The company

pointed investors to the Lake Area Industry Alliance as a possible forum to bring the community and industry together.

Objective – Climate Change and a Healthy Environment: *Engage companies, to improve public disclosure and transparency in reporting presented by 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.*

[Redacted] (Resolution – CONFIDENTIAL)

DFMS worked closely with CCLA (Church of England investment management firm) in a confidential engagement with an energy company.

Nucor Corporation (Dialogue)

Call with Nucor to discuss investor concerns regarding the Company's long-term greenhouse gas targets. The company believes it is the most sustainable North American steelmaker because of its electric arc-based steelmaking process. It has a Net Zero ambition for 2050 but has not yet set an interim target. The company believes the easiest reductions will be to Scope 1 and 2 emissions; Scope 3 is much more difficult to measure and reduce for Nucor because of carbon content of raw materials and heavy transportation needs. Nucor is participating in the Science-based Targets Initiative work with steelmakers, but it has concerns about the direction the work is taking. It believes that it may be taking an overly complex route to Net Zero.

In a later dialogue, investors learned that Nucor pulled out of the Steel Group within the Science-based Targets Initiative (SBTI) and wanted to discuss the reasoning behind Nucor dropping out. The company notes that its steelmaking uses electricity and that the Paris-aligned pathway proposed by SBTI would set up a tiered system to assess steelmakers that Nucor believes penalizes electric arc steelmakers, making it more difficult for the company to set and meet targets as compared to steelmakers that use fossil-fuel-based steelmaking process. The company currently doesn't see a full pathway to Net Zero due to the limits of renewable energy to provide sufficient power for its high-demand business.

Objective – Climate Change and a Healthy Environment: *Engage companies to accelerate progress towards a net zero future in the food sector focused on the Ceres Food Emissions 50.*

Darden Restaurants, Inc. (Resolution)

In a meeting with investors, Darden stated that it has committed to a strategy to address Scope 1 and 2 emissions with the goal of achieving 100% renewable energy by 2023. There is no quantifiable target

date for Scope 1 and 2 as part of its roadmap. Darden is also waiting for verification on the number of emissions used before disclosing.

DFMS filed a resolution requesting that Darden issue near-and long-term science-based greenhouse gas reduction targets for Scopes 1, 2 and 3 emissions aligned with the Paris Agreement’s ambition of maintaining global temperature rise to 1.5 degrees Celsius and summarize plans to achieve them. The resolution is off-cycle and will be voted on later in 2023.

Ingredion (Dialogue)

As part of the Food Emissions 50, DFMS participated in a dialogue with Ingredion discussing the company’s well-below 2 degrees Celsius science-based targets, which were validated. Ingredion has committed to reducing absolute Scope 1 and 2 greenhouse emissions by 28% and absolute Scope 3 GHG emissions by 15% by 2030 from a 2019 base year.

Ingredion released its 2022 ESG report. The report covers (1) goals and targets to achieve a 25% reduction in absolute GHG emissions by the end of 2030, (2) source 50% of purchased electricity from renewable sources by the end of 2030, (3) reduce its water use intensity by 30% in all extremely high-stress geographies where it manufactures products by the end of 2030, (4) assess agricultural biodiversity risks for priority crops and sourcing regions by the end of 2030, and (5) achieve zero deforestation or 100% sustainable use of forest-based resources by the end of 2030.

Objective – Climate Change and a Healthy Environment: *Engage financial institutions to ensure commercial lending and investment policies address socioeconomic and environmental concerns, particularly climate change, water stewardship, pipelines, financing in their lending practices.*

American International Group (Dialogue)

In a dialogue with AIG, investors discussed the company’s climate lobbying report and Shareholders suggested specific improvements on how its own lobbying activities reflect long-term Net Zero goals. The company is beginning to look at where it needs to focus to meet goals, finding gaps in emissions data is a problem in many industries. The company is also looking at the possibility of a science-based target, but it is spinning off its life insurance business and that project is taking time.

JPMorgan Chase (Resolution)

DFMS filed a resolution requesting that JPMorgan Chase issue a report disclosing a transition plan that describes how it intends to align its financing activities with its 2030 sectoral greenhouse gas emissions reduction targets. During a call with the company, investors raised questions about how the bank is operationalizing Net Zero targets. JPMorgan Chase is spending time educating bankers on transition and goals and working with clients to push investments in transition. The company is

planning to start looking at aviation as its next focus for assessment and action but has no plans to exit the oil and gas sector.

During another call with the company, investors discussed the transition plan resolution and learned that the bank is developing a framework for the companies in its priority industries and targets have been set. The national pushback on ESG investing is having an impact on its conversations with companies but the company is waiting on the U.S. climate disclosure rule and watching the EU reporting framework to help with planning. The Company's Carbon Assessment Framework is playing a role in how it manages client relationships, not only for loan but also in capital markets. JPMorgan Chase noted that it is still working within the Net Zero Banking Alliance on how to address issues like offsets.

The transition plan resolution received 12.44% of the vote at JPMorgan Chases' annual general meeting.

PNC Financial Services Group (Resolution)

DFMS filed a resolution asking that PNC set near, and long-term greenhouse gas emission reduction targets aligned with the Paris Agreement's ambition to limit warming to 1.5 degrees Celsius. Investors later had a call with PNC to discuss the resolution and shareholders noted that the bank has grown significantly with new acquisitions and is now in group of the largest U.S. banks. However, the Company lags behind its new peers in setting targets—many of its peers have Net Zero and 2030 targets. The company is learning about its client base and is not ready to set a Net Zero target.

Investors had another call with PNC to discuss what they are looking for in mid-term (2030 or 2035) targets. Investors noted that once the company's Partnership for Carbon Accounting Financials (PCAF) baseline is complete, it should be able to set targets for the highest emitting sectors. The bank is in a pilot phase of training key employees in talking to clients about targets and lowering emissions, basics of climate science and ESG principles as part of training.

During a meeting with PNC, investors learned that the bank is close to having data on financed emissions of highest emitting sectors. PNC disclosed that it would be willing to detail financed emissions in one of its highest emitting sectors in its 2023 Task Force on Climate-Related Financial Disclosures (TCFD) Report and state that it plans to adopt a 2030 target for that sector in its 2024 TCFD Report. The target will be an intensity target due to flaws in data and will cover business loans. Investors discussed the resolution and withdrew the resolution due to the company meeting our request.

Objective – Climate Change and a Healthy Environment: Engage companies to ensure positive community impact of company operations on society, local economy and environmental concerns are appropriately assured and transparently reported (sustainability reports) including environmental justice concerns and the impacts on the most vulnerable such as: women, Indigenous persons, and people who are impoverished. In addition, with the Church Pension Fund, add a sustainability expert on the board to advocate for positively impacting the environment CO21.

Chewy (Resolution)

DFMS filed a resolution as lead filer requesting that online pet retailer Chewy issue a report describing the Company’s ESG policies, performance, and improvement targets, including a discussion of greenhouse gas emissions management strategies and quantitative metrics. In a call with the company, Chewy noted that it is waiting for SEC climate rule finalization before publishing its initial ESG report. The Company is currently going through the audit and verification process on its emission numbers and will be setting targets once the numbers are finalized for Scope 1-3. Chewy has looked at the reporting framework and will likely align with known frameworks. Its goal is to publish the ESG report in 2024 and the Company does not want to put targets out before the numbers come out. Chewy understands that most of its footprint is Scope 3 (70 -90%) so when it releases report, it wants to make sure Scope 3 is included. The Company will work on a climate transition plan after ESG disclosure and number verification and recently hired an ESG lead and have an internal ESG working group.

Investors withdrew the resolution based on a signed agreement stating that after the Company gets its emissions numbers verified, it will publish an ESG Report and set reduction targets. These implementations are likely to take place in 2024.

Corporate Governance and Accountability

Objective – Governance and Diversity: Engage companies to address board diversity to include women and people of color. Engage companies to address income inequalities, racial disparities, and other human capital issues to promote a just society.

Johnson & Johnson (Resolution)

DFMS filed a resolution asking the Board of Directors to establish and report on a process by which the impact of extended patent exclusivities on product access would be considered in deciding whether to apply for secondary and tertiary patents. Secondary and tertiary patents are patents

applied for after the main active ingredient/molecule patent(s) and which relate to the product. The resolution was challenged due to dealings with matters related to the Company's ordinary business operations. The SEC couldn't concur with the company's view and the challenge was denied.

Investors met with the Company to discuss the patent resolution. The meeting was extremely short, and the Company asked shareholders to send over language they would like added. The patent resolution received 14.42% of the vote at JNJ's annual general meeting.

UnitedHealth Group (Resolution)

DFMS filed a resolution requesting the Board of Directors to oversee a third-party audit which assesses and produces recommendations for improving the racial impacts of UnitedHealth Group's policies, practices, products, and services. In a dialogue with UnitedHealth, the Company noted that it is taking steps to address the issue of algorithmic harm through the formation of internal advisory and oversight boards around AI. In another call, UnitedHealth continued to assert that it is doing everything it can regarding health equity and pointed to its internal DE&I initiatives, community giving, and Medicaid certifications. However, the Company still will not disclose any data to support these assertions, nor will it release any data on the enforcement of its AI policies. Shareholders decided that the resolution would remain on the proxy.

Shareholders filed a proxy memo urging other investors to vote for the REA and the resolution received 20.61% of the vote at UnitedHealth Group's annual meeting.

Objective – Governance and Diversity: *Engage companies to address political spending, lobbying and trade associations contribution and other financial support such as political ads and trade association memberships to climate issues. Ensure companies align public pronouncements with expenditures in lobbying and stated values match lobbying asks about regulation, investments and that asks are in line with transforming industries that are harmful.*

United Parcel Service (Resolution)

DFMS filed a resolution urging UPS to conduct an evaluation and issue a report annually, beginning in 2023 describing if, and how, its lobbying, directly and through the activities of its trade associations and other UPS-funded organizations, aligns with the Paris Climate Agreement's goal to hold the increase in the global average temperature to well below 2 degrees Celsius above preindustrial levels, aspiring to limit increases to 1.5 degrees Celsius. In a call with UPS to discuss the shareholder resolution, the Company asked about reporting best practices and discussed how it has engaged with recent legislation, including the Inflation Reduction Act, and the type of policies that it believes would be helpful to support its climate goals. The resolution was withdrawn due to UPS agreeing to issue a climate lobbying report.

Walt Disney (Dialogue)

ICCR partners filed a resolution with Walt Disney requesting the preparation of a report, updated annually, disclosing company policy and procedures governing lobbying, both direct and indirect, and grassroots lobbying communications. In a call with the Company to discuss the shareholder resolution, ICCR partners received the following offers from Walt Disney: (1) fully disclose trade associations, (2) do a lobbying alignment report, and (3) schedule a meeting with investors and the government relations director. Shareholders and Walt Disney were able to reach an agreement that satisfied the requirements of the resolution, so it was withdrawn.

Continuance

CCSR, celebrating its 53 years of ethical investing advocacy, believes that as long as the Church invests in securities, there will be a need for CCSR. Therefore, continuance is recommended.

Budget Request

A significant portion of our committee's work should already be included in existing DFMS budget, but we name them here for the sake of clarity:

- The Episcopal Church's ICCR membership and the Heartland Initiative contract will be paid as an investment management expense (see General Convention resolution 2018-A296 and EXC102019.15); and the Mercy Investment Services contract will be funded within the Treasurer's budget. We request continuance of the ICCR membership and both consultant contracts in this manner.
- We understand all the Interim Bodies meeting budgets will be included as line item in the General Convention Office budget and that the final meeting schedule is determined by the officers of The General Convention once all the interim bodies are established. As CCSR, we request that we be able **meet in person once per year in the 2024-2027 triennium** to enable a full discussion of our corporate advocacy priorities and develop our strategies for the coming year. We would intend to meet several times each year via Zoom as well.
- **Additional funds request:** We request consideration of additional funds of **\$20,000 for the 2024-2027 triennium**. These funds would support:
 - CCSR member travel to ICCR meetings, now being held in person again, two times per year, in New York City, and meetings held by institutional investors of the Church, such as the Episcopal Parish Networks, and parishes and dioceses (estimating these expenses as \$14,000 for travel to send one representative to each ICCR meeting at

\$2,000 x six meetings during the triennium, plus one additional trip during the triennium, for a total of \$14,000; and

- o CCSR information and outreach to the wider church as described in our report: materials development and design, language translation, purchase, printing, and shipping estimated at \$6,000 – this would include materials to bring to events such as an Episcopal Parish Network conference; to send or bring to dioceses and parishes as part of our information campaign; and to bring to General Convention in 2027.

Proposed Resolutions

A028 Support for Freedom to Consider Ethical Issues in Investing

Resolved, That the 81st General Convention reaffirm its commitment to and encouragement across the Church of faithful and ethically responsible investing addressing ethical concerns for social, environmental and governance matters, including climate change and human rights, commonly referred to as ESG (Environment, Social, Governance) investing as set forth in General Convention resolution 2022-A073; and be it further

Resolved, that General Convention reaffirm the Episcopal Church's long practice of aligning its investments with the values of Jesus Christ as expressed in General Convention and Executive Council resolutions, through such means as corporate engagement through dialogue, filing and voting on shareholder resolutions, voting in director elections, and divestment and affirmative investment, including ESG (Environment, Social, Governance) investing, and, more broadly, participation in boycotts and sanctions campaigns, as with South Africa, all in order to help carry out the Church's commitment to environmental sustainability, justice, and equal rights at home and globally, while generating positive financial returns; and be it further

Resolved, that General Convention affirm the use of ESG investing by Executive Council's Investment Committee in its management of the investments of the Domestic and Foreign Missionary Society (DFMS), and affirm the work of the Executive Council's Committee on Corporate Social Responsibility (CCSR) in advocating for corporate engagement through dialogue, filing and voting on shareholder resolutions, voting in director elections, and divestment and affirmative investment, including ESG (Environment, Social, Governance) investing, as CCSR supports General Convention and Executive Council in carrying out their responsibilities for the Church's investments; and be it further

Resolved, that General Convention affirm and support the Church's advocacy for the right of all investors, whether or not they are guided by faith commitments, to consider all financial and other factors relevant to investing, to use ethical criteria, including ESG investing, to assess investment risks

and opportunities, and to engage with companies, including through dialogue and voting, in making responsible investments; and be it further

Resolved, that General Convention lament, condemn and oppose proposals and actions of some federal, state and local legislatures and agencies, and attorneys general, to suppress and outlaw the consideration of all financial and other factors relevant to investing and the use of ethical criteria, including ESG investing, to assess investment risks and opportunities; and be it further

Resolved that General Convention encourage the Church to advocate publicly for the freedom to invest responsibly and against legislation that would prohibit divestment, or ESG investing, or consideration of all environmental, social and governance factors relevant to responsible investment decision-making; and be it further

Resolved, that General Convention encourage active support for the rights of shareholders to raise important issues through the proxy resolution and voting process, including support for the authority of the United States Securities and Exchange Commission to rule on shareholders' access to corporate ballots; and be it further

Resolved, that General Convention direct CCSR, as part of its advocacy of responsible investing, to continue its ongoing engagement, divestment and investment work with companies that contribute to and/or benefit from human rights violations and/or environmental exploitation in areas of conflict and high risk, such as Sudan, Myanmar, the Occupied Palestinian Territories, and elsewhere; and be it further

Resolved, that General Convention commend CCSR's 53-year record of promoting corporate responsibility and encourage all dioceses and congregations to view The CCSR Story video (currently linked at <https://www.episcopalchurch.org/video/the-ccsr-story/>) that celebrates our Church's witness, and to share the video with their people.

EXPLANATION

ESG:

Environment – striving for protection of all God's creation, especially through a clean energy future

Social – Promoting human and civil rights through justice for all humanity

Governance – promoting equity in the workplace and diversity among corporate leadership (gender and ethnicity)

(See generally General Convention resolution 2022-A073, appended at the end of this explanation.)

Using ESG promotes responsible investing that aligns with the Church's values while also assuring sound financial returns.

Divestment has been a tool of the Church for decades, as has been affirmative investment. The Church has used these tools on issues like tobacco, fossil fuels, private prisons, military contractors, and South Africa apartheid, and other instances where human rights have been or are being denied and/or routinely ignored, such as in the Occupied Palestinian Territories, Sudan, and Saudi Arabia. Other tools include boycotts—such as those of Nestle infant formula (1979) and of oil companies doing business in South Africa (1988)—and advocating with government for government action, such as imposing government financial sanctions on South Africa (which ultimately led to the end of apartheid).

In the United States, some federal, state and local legislatures and agencies, and attorneys general, have sought recently to ban or stifle use of ESG by government investors. These efforts, while not aimed directly at the Church, threaten the Church's ability to continue its efforts, now carried on over many years, advocating for applying ethical standards by all investors, including faith-based investors.

The Freedom to Invest campaign, launched by CERES and other responsible investors, is pushing back against this dangerous threat. The Church can influence the public to reject such efforts to suppress ESG.

Previous General Convention resolution on this topic:

2022-A073 Encouraging Faithful, Ethical, and Responsible Investing

Final [Original Documents](#)

Resolved, That the 80th General Convention affirm to all institutional investors across the Church the value and importance of faithful and ethical investing (defined as investing institutional assets consistently with the Church's faith and teachings and the Church's mission) and responsible investing (defined as addressing, ethical concerns for social, environmental and governance matters, including climate change and human rights); and be it further

Resolved, That all institutional investors across The Episcopal Church be encouraged to adopt faithful and ethically responsible investing for their investment programs and portfolios and to manage their investment assets using the following elements of ethically responsible investing: ethical and theological guidelines for investment selection and management; shareholder engagement, including voting proxies; and investing for responsible social and environmental outcomes as well as for financial return.

A029 Divest from Fossil Fuels

Resolved, That the 81st General Convention express appreciation that the Investment Committee of Executive Council has acted responsibly to implement General Convention resolution 2015-C045, calling for divestment of fossil fuel companies from the investment portfolio of the Domestic and Foreign Missionary Society (DFMS) and for reinvestment of DFMS assets in clean energy alternatives, and be it further

Resolved, that, having learned that the Church Commissioners of the Church of England and, separately, the Church of England Pensions Board announced on June 22, 2023 that each will divest from all fossil fuel investments by the end of 2023, and noting that more than eight years have passed since the adoption of resolution 2015-C045, this General Convention direct that any and all investments in companies in fossil fuel industries remaining in the DFMS portfolio be sold by December 31, 2024, and be it further

Resolved, that all institutional investors across The Episcopal Church be requested to take note of the decisions of General Convention that DFMS is (a) to divest fully and finally from all companies in fossil fuel industries by December 31, 2024, and (b) to reinvest divested fossil fuel company assets in clean energy alternatives, and that all such institutional investors be encouraged to adopt the same target for full and final divestment of such fossil fuel company investments and also to reinvest such assets in clean energy alternatives.

EXPLANATION

The Executive Council's Committee on Corporate Social Responsibility noted in its Blue Book report that several fossil fuel companies remain in the equity portfolio of the Church while also being on the No Buy List. This is part of a transition to full exclusion or divestment called for by the 2015 General Convention in 2015-C045. Chevron, now the largest oil company in the U.S., Phillips Petroleum, Valero and Marathon were among the remaining companies at the time of the preparation of the Blue Book. CCSR, having reviewed this matter, recommends that any and all investments in fossil fuel companies remaining in the DFMS investment portfolio be fully and finally divested by December 31, 2024.

A030 No Investment in Certain Weapons

Resolved, That the 81st General Convention of The Episcopal Church adopt the following as investment policy for the Domestic and Foreign Missionary Society (DFMS) (hereinafter, the DFMS No Investment in Certain Weapons Policy):

That DFMS shall not invest in any company or corporation that is engaged or involved in the production, use, or stockpiling, or the sale, transfer, or export of, any weapon or weapons system, or any key component thereof, whether now existing or developed hereafter, that can cause or lead to mass or indiscriminate injury or death to civilians or widespread destruction of civilian infrastructure, including, without limitation, biological weapons, chemical weapons, nuclear weapons, weapons that injure by fragments which are not detectable in the human body (non-detectable fragment weapons), incendiary weapons, blinding laser weapons, anti-personnel mines, cluster munitions, and lethal autonomous weapons, or any other weapons or weapons systems or key components thereof that are excessively injurious or have indiscriminate effects;

And be it further

Resolved, That this Convention direct the Executive Council Committee on Corporate Social Responsibility to create and administer a DFMS Weapons No Buy List based on the DFMS No Investment in Certain Weapons Policy; and be it further

Resolved, That this General Convention recommend the DFMS No Investment in Certain Weapons Policy to each institutional investor in The Episcopal Church for adoption as investment policy for that institutional investor and direct that this resolution be shared with all institutional investors in The Episcopal Church.

EXPLANATION

The Episcopal Church already has a policy that the Domestic and Foreign Missionary Society (DFMS) shall not invest in any company that makes certain weapons that are excessively injurious or have indiscriminate effects — cluster bombs, anti-personnel land mines, chemical and nuclear weapons— and such companies are placed on a DFMS portfolio screen or “No Buy” list; the latest policy on this topic was passed by Executive Council in June 2023 based on existing General Convention resolutions. This new resolution would clarify that the prohibition should extend to all weapons and weapons systems, whether now existing or developed hereafter, that are excessively injurious or have indiscriminate effects, including those developed in recent decades, such as blinding laser weapons and lethal autonomous weapons and any weapon or weapons system that is designed to cause mass or indiscriminate injury or death to civilians or widespread destruction of civilian infrastructure.

By passing this resolution, General Convention would adopt this investment policy for DFMS and recommend the same investment policy for adoption by all other institutional investors in The Episcopal Church.

In addition, by this resolution the Executive Council Committee on Corporate Social Responsibility (CCSR) would be tasked with reviewing the DFMS investment portfolio and recommending to the Executive Council those companies that should be placed on a comprehensive DFMS “Weapons No Buy List.”

Leading socially responsible and faith-based investors in North America and Europe proscribe investment in companies involved in the use, production, stockpiling, sale, transfer, or export of such weapons and/or their key components. Companies involved in such weapons and/or their key components are excluded from investment portfolios because the use of such weapons violates, as a regular matter, fundamental humanitarian principles. Such weapons are prohibited by international treaties, including:

- The Ottawa Treaty (1997), which prohibits the use, stockpiling, production, and transfer of anti-personnel mines.
- The Convention on Cluster Munitions (2008), which prohibits the use, stockpiling, production, and transfer of cluster munitions.
- The Chemical Weapons Convention (1997), which prohibits the use, stockpiling, production, and transfer of chemical weapons.
- Biological Weapons Convention (1975), which prohibits the use, stockpiling, production, and transfer of biological weapons.
- The Treaty on the Non-Proliferation of Nuclear Weapons (1968), which limits the spread of nuclear weapons to the group of so-called Nuclear Weapons States (i.e., United States, Russia, United Kingdom, France, and China).
- Council Regulation (EU) 2018/1542 of 15 October 2018 concerning restrictive measures against the proliferation and use of chemical weapons.

Further, in 2019 the Norwegian government appointed a committee to review and make recommendations concerning the *Guidelines for Observation and Exclusion of Companies* of the Norwegian Government Pension Fund Global, the world’s largest sovereign wealth fund. The Committee proposed that lethal autonomous weapons (LAWs) be added to the list of proscribed weapons, finding:

In the Committee’s opinion, it is fundamentally problematic that the critical decisions relating to the use of force are not subject to meaningful human control. Although the future may see the emergence of technological sophistication capable of meeting the requirements of distinction under humanitarian law, i.e., the capacity to distinguish between military objectives and civilians, such autonomy would still be ethically problematic because of the ensuing erosion and disintegration of accountability implied under humanitarian law.⁵

The Episcopal Church’s faith-based investor peers are similarly adopting exclusionary screens for such weapons, including the Presbyterian Church (USA)⁶, The Church of England⁷, Friends Fiduciary⁸, Wespath Benefits & Investments⁹, and United Church Funds.¹⁰

The expanding list of types of weapons that can cause or lead to mass or indiscriminate injury or death to civilians or widespread destruction of civilian infrastructure, and the expanding scope of exclusionary screens, correspond to improved awareness, understanding, and documentation of the ways in which such weapons are used in violations of international humanitarian and human rights law and the devastating consequences of such use for civilian populations and infrastructure in conflict-affected areas around the world.

⁵ Ola Mestad, “Values and Responsibility: The Ethical Framework for the Norwegian Government Pension Fund Global,” June 15, 2020, <https://www.regjeringen.no/contentassets/86dac65c22384dda9584dc2b1a052a91/en-gb/pdfs/nou202020200007000engpdfs.pdf> (accessed August 2, 2022).

⁶ Presbyterian Church (USA), “2022 General Assembly Divestment/ Proscription List,” October 4, 2021, <https://www.presbyterianmission.org/wp-content/uploads/FINAL-APPROVED-MRTI-2022-GA-Long-Form-Divestment-List.pdf> (accessed August 2, 2022).

⁷ Church of England Ethical Investment Advisory Group, “Defence investments policy,” May 2010, <https://www.churchofengland.org/sites/default/files/2017-11/Defence%20Investments%20Policy.pdf> (accessed August 2, 2022).

⁸ Friends Fiduciary, “Investment Guidelines,” June 2020, <https://friendsfiduciary.org/wp-content/uploads/Investment-Guidelines-June-2020-FINAL.pdf> (accessed August 2, 2022). ⁹ Wespath Benefits & Investments, “Investment Exclusions Guidelines,” 2022, <https://www.wespath.org/retirement-investments/investment-information/investment-philosophy/investment-exclusions/investment-exclusions-guidelines> (accessed August 2, 2022).

¹⁰ United Church Funds, “Corporate Social Responsibility,” https://ucfunds.org/wp-content/uploads/2019/09/InvEdu_CSR.pdf (accessed August 2, 2022).

Exclusionary lists vary by investor, but such lists typically exclude biological weapons, chemical weapons, nuclear weapons, non-detectable fragments, incendiary weapons, blinding laser weapons, anti-personnel mines, cluster munitions, and lethal autonomous weapons (LAWs).¹¹

General Convention and Executive Council have adopted positions on four types of weapons that are excessively injurious or have indiscriminate effects: nuclear weapons, chemical weapons, anti personnel mines, and cluster munitions. In addition, Lambeth Conferences since 1930 have continued to affirm that “war as a method of settling international disputes is incompatible with the teaching and example of Our Lord Jesus Christ.”

The 74th General Convention endorsed study of the criteria and moral standards of “Just War Theory.” The fundamental incompatibility of the weapons discussed above with humanitarian principles would necessarily lead to the conclusion that their use conflicts with these criteria and standards, especially the following elements of Just War Theory:

Noncombatant immunity: Civilians may not be the objects of direct attack, and military personnel must take due care to avoid and minimize indirect harm to civilians.

Proportionality: In the conduct of hostilities, efforts must be made to attain military objectives with no more force than is militarily necessary and to avoid disproportionate collateral damage to civilian life and property.¹²

In sum, the use of the types of weapons and weapons systems identified above (and any additional ones with similar effects that may be developed) is fundamentally incompatible with humanitarian principles and the moral standards embodied in Just War Theory. Such weapons and weapons systems are proscribed from use in warfare on moral grounds specifically due to their lack of precision, the user’s inability to control, minimize, or avoid harms they cause, their high degree of lethality to civilians, and the widespread destruction they cause to civilian infrastructure. As their use in war is proscribed by international standards, the securities of companies that make and sell them also should be excluded from Church investment portfolios.

¹¹ Ibid.

¹² Episcopal Peace Fellowship, “Cross Before Flag: Episcopal Statements on War and Peace,” February 2005, https://www.episcopalchurch.org/wp-content/uploads/sites/2/2020/12/cross_before_flag.pdf (accessed August 2, 2022).

EXECUTIVE COUNCIL COMMITTEE ON HBCUs

Members

The Very Rev. Canon Martini Shaw, D.Min., Chair	Pennsylvania, III	2021
Scott E. Evenbeck, Ph.D., Vice-Chair	New York, II	2021
Martha Bedell Alexander, Ed.D.	North Carolina, IV	2021
The Rev. Canon James G. Callaway, D.D.	New York, II	2021
Joel L. Cunningham, Ph.D.	Tennessee, IV	2021
Canon Anita George, Ph.D.	Mississippi, IV	2021
The Rev. Canon Michele Hagans, D.Min.	Washington, III	2021
The Rev. Eugene Y. Lowe, Ph.D.	New York, II	2021
The Rt. Rev. Samuel Rodman	North Carolina, IV	2021
The Rt. Rev. Ruth Woodliff-Stanley	South Carolina, IV	2022
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	n/a
The Most Rev. Michael Curry, D.D., Ex Officio	North Carolina, IV	2021

Changes in Membership

The Rev. Richard A. Burnett (Southern Ohio, V), added 9/2023

Representation at General Convention

Bishop Samuel Rodman, Bishop Ruth Woodliff-Stanley and Dr. Martha Bedell Alexander.

Mandate

2015 - AN028

Resolved, That the Executive Council establishes a committee of Executive Council from the task group formed January 11, 2015 to continue to support and understand the role of Historically Black Colleges and Universities and the important relationship with The Episcopal Church; and be it further

Resolved, That the Executive Council charges the committee to explore and make recommendations to Executive Council by General Convention 2021 the long-term needs of the HBCUs to ensure access to students of color for future generations; and be it further

Resolved, That the Executive Council authorizes a budget up to \$15,000 for this triennium for the work of the committee with composition to consist of the current membership of the task group and that the committee may consist of eight to ten members jointly appointed by the Presiding Officers and provide to Executive Council an annual report at the June meetings of Council; and be it further

Resolved, That the Executive Council expresses gratitude to the members of the task group for their contributions in forging an important relationship between TEC and the schools and requests a report of the accomplishments of the task group to date be prepared by the end of 2017.

Summary of Work

The work of the Episcopal Historically Black Colleges and Universities Committee (HBCUs) has focused since our last report on seeking ways to strengthen the capacity of Saint Augustine's University and Voorhees University to fulfill their educational missions. The HBCUs Committee has met virtually thirteen times in the last two years. Our group has met in person once during this period on the Saint Augustine's campus in a meeting that also included Voorhees University's new dean of the chapel.

In addition to fund raising support, the HBUC's Committee is pleased to report that both institutions now have chaplains. The Rev. Hershey Mallette Stevens continues her ministry at Saint Augustine's University, having recently returned from parental leave. Voorhees University has recently announced the appointment of the Rev. Marie-Carmel Chery as Dean of the Chapel and Spiritual Engagement.

These appointments have each been completed with the cooperation and support of the cognizant diocesan bishops of the dioceses of North Carolina and South Carolina. Both Bishop Rodman and Bishop Woodliff-Stanley are members of the Committee.

Both Saint Augustine's and Voorhees Universities have emerged from the pandemic period with a revitalized focus and programming designed to transform lives and hopes of the students they are committed to serve. Voorhees has completed its SACS-COC accreditation, and embarked on new initiatives in the local community. St. Augustine's is making progress on plans to address deferred maintenance.

With the support of TEC office of development, both institutions have benefitted from increased support from the Absalom Jones Fund. We have also encouraged Voorhees and Saint Augustine's Universities to use the TEC development office for advice and support about other fund-raising opportunities in the church.

A highpoint in the Committee's efforts of making our HBCUs more known among Episcopalians came at the Episcopal Parish Network Annual Conference in Jacksonville in February 2023, which highlighted the two universities. The combined choirs from both universities gathered in Jacksonville to sing at the opening of the conference before Jon Meacham's keynote that recognized them. T.J. Houlihan, from the TEC development office collaborated to make the visit meaningful to the students, with hospitality assistance of Kurt Barnes, TEC's chief financial officer.

These two institutions carry forward historic commitments of TEC to address and redress the destructive and sin-filled consequences of racism in the church and in the USA. The HBUCs Committee and our two universities deeply appreciate the financial support that the GC has made in recent triennial budgets.

While Episcopalians can take pride in our continuing support, but budget allocations have remained flat in the last decade. It is time now to address this gap by increasing the annual grant to each school to \$500K per year for the next triennium. We come to this conclusion based on our assessment of the

history we outline in the supplemental materials, the commitment TEC is undertaking to reckon with this history, and the need these universities address to provide educational and life changing opportunity to students with limited means (demonstrated by their high Pell grant eligibility) and high hopes.

Given the particularly challenging contexts that private HBCU's continue to confront, we are forwarding to the budget committee the recommendation to address the budget and priorities committee about this substantial increase in the budget for the coming three years. After careful consideration, our committee recommends this request to provide additional TEC resources to support the core missions of our two remaining Episcopal HBUCs

Supplementary Materials

While not necessary, some groups may want to include supplementary materials. If you would like to do so, please be in touch with the GCO (gc.support@episcopalchurch.org) and we will advise you further. All supplementary documents must be approved and in a translatable form. For example, a copyrighted document would not be allowed unless written permission to publish were obtained by the group. Or, for example, supplemental material might not be included because it is provided as a PDF file, which cannot be translated.

Historical Episcopal Church HBCU role

In 1865, The Episcopal Church's General Convention organized the Protestant Episcopal Freedman's Commission (renamed the Commission of Home Missions to Colored People in 1868), to establish schools in the South that would provide higher education and religious instruction to African Americans.

The American Church Institute for Negroes (ACIN), founded in 1906, was renamed the American Church Institute (ACI) in 1961. It was established to coordinate church-affiliated schools and refocus attention on the educational needs of men and women of color. The ACIN administered schools and colleges dedicated to the education of African Americans in the South to fulfill the Church's mission to close the gap between educational opportunities for African Americans and whites. In 1924 the Institute agreed to support the college as its South Carolina member, beginning the Episcopal Church relation that continues today.

ACI began its work three years prior to the founding of the NAACP and dissolved three years after passage of the Civil Rights Act of 1964. During those years, ACI witnessed a major shift in American society's approach to rights for African Americans, from a "separate but equal" segregation-based policy, to a growing movement toward a racially integrated society at all levels, including education. While ACI's decision to cease its oversight of schools arose from concern that it was supporting segregated education, its positive contributions to higher education for African Americans remain. Since 1965 support for the remaining Episcopal HBCUs has been provided through General Convention allocations, drawing on remaining ACI endowments and general church funds.

EXECUTIVE COUNCIL ECONOMIC JUSTICE LOAN COMMITTEE

Members

The Rev. Will Mebane, Chair	Massachusetts, I	2024
The Very Rev. M.E. Eccles	Chicago, V	2024
Mr. Timothy Gee	El Camino Real, VIII	2024
The Rt. Rev. Anne Hodges-Copple	North Carolina, IV	2024
Mr. Joe McDaniel	Central Gulf Coast, IV	2024
Ms. Diane Pollard	New York, II	2024
Mr. Byron Rushing	Massachusetts, I	2024
The Rev. Andrew Walter	Washington, III	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	

Representation at General Convention

The committee representatives at General Convention are the following:

- Joe McDaniel, HOD, Diocese of the Central Gulf Coast
- The Rev. M.E. Eccles, HOD, Diocese of Chicago
- The Rt. Rev. Anne Hodges-Copple (resigned North Carolina), HOB
- Mr. Timothy Gee, HOD, Diocese of El Camino Real
- Diane Pollard, HOD, Diocese of New York

Acknowledgements

Mr. Kurt Barnes, *DFMS Treasurer and Chief Financial Officer*

Ms. Margareth Crosnier de Bellaistre, *Director of Investment Management and Banking*

Mr. Tanie Oconer, *Assistant Controller*

Mrs. Nancy Caparulo, *Staff Liaison*

Mandate

2015 - AN/FFM 007

The following is a true copy of a Resolution adopted by the Executive Council at its meeting from November 15-18, 2015 at which a quorum was present and voting. Resolved, That the Executive Council, meeting in Linthicum Heights from November 15-18, 2015, establish the Executive Council Economic Justice Loan Committee to be responsible for overseeing the assets set aside by General Convention and Executive Council for loans that support greater economic justice by enhancing people's ability to improve their economic wellbeing and empowering the powerless and oppressed. The Economic Justice Loan Committee is to be made up of a minimum of five persons nominated by the Presiding Officers and appointed by the Executive Council, from the Investment Committee and Committee on Corporate Social Responsibility and other appropriate persons at large. The Committee will report on its work to Executive Council at least once annually through the Committee on Corporate Social Responsibility or the Investment Committee. Loan criteria are to be approved by Council.

Summary of Work

The Episcopal Church has committed \$7 million of its assets for economic justice initiatives around the globe and in the United States. The Executive Council Economic Justice Loan Committee (EJLC) administers this \$7 million in TEC endowment funds as a loan portfolio. The funds in the portfolio are used on a revolving basis to provide loans, indirectly, to organizations, institutions and individuals that may not qualify in the regular credit markets but have worthy community economic justice development programs and projects. The principal, upon repayment to TEC, is re-loaned by TEC to others. All the loans pay interest, and that interest income is used to support TEC's program budget.

Since the beginning of 2023, EJLC has met four times, and will continue to meet once each quarter, to review potential borrowers.

EJLC loans generally range in size from \$250,000 to \$350,000 and may be as large as \$500,000. Every EJLC loan enjoys the support of the local Episcopal diocesan bishop. The most recent loan portfolio is posted on the Finance Office website at <https://www.episcopalchurch.org/wp-content/uploads/sites/2/2023/10/Economic-Justice-Loan-Program-Report.pdf>

The EJLC program does not lend directly to the end users of the funds but only to financial intermediaries such as community development loan funds or community development credit unions. These intermediaries, commonly called Community Development Financial Institutions

(CDFIs), themselves re-lend the monies provided by TEC to groups, organizations and individuals with needs to finance community economic justice development programs and projects. Many CDFIs operate in the United States, and many operate globally.

Examples of investments made through the program overseen by EJLC include:

- Support of community economic development in the Holy Land, TEC recommitted a \$500,000 deposit with the Bank of Palestine, earmarked by TEC for creating and supporting small businesses in the Palestinian community, especially businesses owned by women.
- Support of housing, economic development, education and health of indigenous people through a \$300,000 loan to Citizen Potawatomi Nation (CPN). CPN is headquartered in Shawnee, Oklahoma, with tribal jurisdictional area in Cleveland and Pottawatomie Counties, Oklahoma. The program offers emergency shelter, counseling services, legal assistance, emergency transportation, and financial assistance.
- Support of community economic development in Mississippi. TEC has made a \$250,000 loan to Renaissance Community Loan Fund (Jackson, MS) that provides financial assistance and development services which facilitate the development of communities in building safe, quality housing for the residents of Mississippi and in creating economic opportunities to add or retain jobs in the community. Lay leadership from Episcopal churches in the Diocese of

Mississippi has been involved in the board and management of Renaissance Community Loan Fund.

- Support of community economic development in South Africa with a \$300,000 deposit note of Shared Interest, a U.S. based fund that guarantees loans by South African banks to members of low-income communities in South Africa to enable them to construct houses, launch small businesses, and create jobs.

Portfolio Composition and Risk Performance

As of September 30, 2023, \$5,947,624 of the allocation was funded into 15 loans and three-term deposits with an average annual yield of 3.0%.

We anticipate \$6,597,624 of the \$7,000,000 EJLC portfolio allocation to be funded by December 31, 2023 at an annual average yield of 3.2% – a rate that is reasonable relative to Treasury yields while providing below market rates to our borrowers.

EXECUTIVE COUNCIL INVESTMENT COMMITTEE

Members

The Rev. Andrew Walter, Chair	Washington, III	2024
Mr. Dale Akinla	New York, II	2024
Mr. N. Kurt Barnes	New York, II	2024
Ms. Janet Brown	California, VIII	2024
Mr. Gordon Fowler	Pennsylvania, III	2024
Mr. Charles Garland	New York, II	2024
Mr. Timothy Gee	El Camino Real, VIII	2024
Ms. Kirsten McElroy	Long Island, II	2024
Mr. James Simon	Ohio, V	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	

Mandate

Executive Council By-Laws Article VIII Sec. 4

Joint Committees Created by the Executive Council

(a) Duties

- i. There shall be a Joint Investment Committee whose charter shall be adopted by the Council.
- ii. The Joint Investment Committee’s charter shall be reviewed annually by the Joint Investment Committee and the Council and renewed annually by the Council.

(b) Membership and Term

- i. The Investment Committee shall consist of the Treasurer of the Council, along with at least six, but no more than nine additional members. At least one of the additional members shall be a member of Executive Council’s Joint Standing Committee on Finances for Mission.
- ii. Members of the Investment Committee shall be nominated jointly by the Chair and Vice Chair of the Council and elected by the Council.
- iii. Members shall serve for a term of three years or until a successor has been elected. Members may serve two consecutive terms, after which three years must elapse before the member may be reelected.

Summary of Work

In accordance with Executive Council By-Laws, the Investment Committee has all the authority of the Council and Board of Directors of the Domestic and Foreign Missionary Society of the Protestant Episcopal Church (DFMS, or the Society) under the law to act on the investment and reinvestment of institutional funds or assets of The Episcopal Church, the General Convention, the Council, and the Society, as well as any other funds or assets held by the foregoing for investment.

The Investment Committee recommends investment objectives designed to provide a sustainable and increasing level of income to support the ministries of The Episcopal Church in accordance with the wishes of the donors or owners of those funds, while preserving the real (inflation-adjusted) purchasing power of the funds. It also develops and regularly updates Investment Policies that assist the Committee in effectively supervising, monitoring and evaluating the investment of the Endowment's assets.

The Committee establishes strategies and policies for the management of the investment portfolio, which includes the trust funds of the official corporation, the Domestic and Foreign Missionary Society of the Protestant Episcopal Church, and other Episcopal entities who wish to co-invest with the DFMS.

The portfolio is diversified and continues to be focused on equities, with approximately 63% invested in equities, 18% invested in fixed income, and 19% in hedge fund-of-funds and real estate. The Committee continues to evaluate the portfolio return while maximizing risk protection by reducing US equity allocation and increasing non-US equity and alternative investments.

Long-term performance of the trusts was negatively impacted by a 19.0% decline in 2022, thus leaving annual returns, after all fees and expenses, of 6.0% for the 10 years ending September 30, 2023. The current one (1) year net return ending September 30, 2023 reflects a 14.8% gain. The portfolio, which is actively managed, has generally outperformed similar portfolios invested in passive investments. Since inception of the portfolio in February of 1993, the annualized net performance has been 7.5%. Since September 30, 2015, the market value of the portfolio has grown from \$346 million to \$536 million, as of September 30, 2023.

The DFMS endowment portfolio consists of the following three types of funds:

- Endowment funds, held and managed by DFMS and benefiting DFMS
- Funds owned and benefiting other Episcopal and Anglican entities in the United States and abroad, for which DFMS is the trustee
- Custodial funds held and managed by DFMS, but owned by and benefiting other Episcopal and Anglican entities in the United States and abroad

There are nearly 1,350 trust funds maintained in a common portfolio, managed by 16 investment managers and participating on a pro-rata basis in all returns of that portfolio. The Society is also trustee for 19 charitable trusts, which are separately invested and managed, but are not commingled with any other fund, as required by law. The Treasurer's Office publishes an annual trust fund book, and the Committee reports regularly to the Executive Council.

The Investment Committee continues to work closely with the Committee for Corporate Social Responsibility and the Economic Justice Loan Committee, with liaisons to each of those committees. The Investment Committee continues to be well-served by Mr. Kurt Barnes and a very dedicated staff from the Episcopal Church Center, as well as by our investment consultants.

The Investment Committee meets four times each year to review performance and discuss current investment issues. The expenses of the Committee are covered by the budget for committees of Executive Council.

JOINT AUDIT COMMITTEE OF THE EXECUTIVE COUNCIL AND THE DFMS

Members

Ms. Tess Judge, Chair	East Carolina, IV	2024
The Rev. Shelly Banner	Central New York, II	2024
Mr. Julian M. Bivins, Jr.	Virginia, III	2024
Canon Andrea McKellar	South Carolina, IV	2024
Mr. Daniel Packard	Arizona, VIII	2024
The Rt. Rev. Phoebe Roaf	West Tennessee, IV	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	

Representation at General Convention

Deputy Tess Judge –East Carolina

Mandate

2022 - Canon I.4.3

Sec. 3. Upon joint nomination of the Chair and the Vice-Chair, the Executive Council shall elect an Audit Committee of the Council and the Domestic and Foreign Missionary Society. The Committee shall be composed of six members: one member who, at the time of appointment, is a member of the Executive Council committee with primary responsibility for financial matters; and the remaining five from members of the Church-at-large having experience in general business and financial practices. The members shall serve a term beginning on January 1 following the regular meeting of the General Convention at which elected or immediately following their appointment, whichever comes later, and continuing through December 31 following the adjournment of the next regular meeting of the General Convention or until a successor is appointed, and may serve two consecutive terms, after which a full interval between regular meetings of the General Convention must elapse before being eligible for reelection. Annually the Audit Committee shall elect a Chair of the Committee from among its members. The Audit Committee shall regularly review the financial statements relating to all funds under the management or control of the Council and the Domestic and Foreign Missionary Society and shall report thereon at least annually to the Council.

Upon recommendation of the Audit Committee, the Executive Council shall employ on behalf of the Council and the Domestic and Foreign Missionary Society an independent Certified Public Accountant firm to audit annually all accounts under the management or control of the Council and Domestic and Foreign Missionary Society. After receipt of the annual audit, the Audit Committee shall recommend to the Council and the Domestic and Foreign Missionary Society what action to take as to any matters identified in the annual audit and accompanying management letter. The responsibilities of the Audit Committee shall be set out in an Audit Committee Charter. The Audit Committee shall review, at least annually, the Committee's Charter and recommend any changes to the Executive Council for approval.

Summary of Work

We draft our report in the summer of 2023, having completed one-third of the 2023-2024 biennium.

The Audit Committee provides oversight of the financial reporting process, the audit process, the system of internal controls, and compliance with laws and regulations on behalf of Executive Council. New York State law, and industry best practices, recommend (and in some cases require) that an organization appoint an audit committee comprised of independent, non-employee members to provide oversight of the organization.

To exercise this oversight, the committee is given broad authority to discuss issues of concern with staff members, employees, board members, and other individuals as needed.

The Audit Committee and the Executive Council and the Domestic and Foreign Missionary Society engage an independent Certified Public Accountant firm to audit annually all accounts under the management or control of the Council and Domestic and Foreign Missionary Society. The Committee may, with the approval of the Executive Council, also hire such independent investigators and firms as may be necessary to review allegations that come to the Committee's attention.

The Audit Committee uses the findings of the annual audit to recommend to the Council and the Society the action needed for any matters identified in the annual audit and accompanying management letter.

The Committee has met two (2) times during 2023 and expects to meet an additional two times during 2023, and four (4) times during 2024. Most meetings are conducted virtually; at least one meeting is held in person annually when the annual audit is received and reviewed. In all meetings, the Committee is able to continue its practice of engaging with senior staff members in executive session to ensure that candid conversations can occur regarding any legal, financial, or other risks to the organization, and receive regular updates on pending litigation.

The Committee also continued to monitor reputational risks to the organization. According to its chartered responsibilities, the Committee reviewed:

- Quarterly and annual financial statements, and the judgements and assumptions underlying them;
- The adequacy of the Society's internal controls especially for cybersecurity;
- The performance, and subsequent recommendation for the appointment, of the external auditing firm;
- The nature and scope of the proposed audit with the independent auditing firm;
- The final audit report of the Society's financial statements and the independent auditors' recommendations to management for improvements in any areas of weakness; and,
- In cooperation with the Society's legal counsel, any potential liability exposure that could directly affect the Society's financial statements.

An unqualified opinion was received from the independent auditing firm, Grant Thornton, for the 2022 financial year. The Executive Council accepted these reports upon recommendation from the Audit Committee.

Major Projects in This Triennium Include

1. The Annual Review of the Audit Committee Charter

The Committee reviewed its charter and recent changes to New York State Law—where the Society is incorporated—on the role of the Audit Committees in Corporate Governance. After conducting the review, the Committee recommended changes to the Charter that included responsibility for reviewing the Society's risk management program, reputational and other, non-financial risks to the organization. The Executive Council accepted the recommended revisions to the Audit Committee's charter.

2. The Appointment of the External Auditor

In 2023, the Committee expects to recommend that Grant Thornton, LLP be appointed to complete an audit of the Society's financial statements for 2023. This recommendation will be forwarded to the Executive Council.

In 2024, the Audit Committee plans to conduct a comprehensive request for a proposal process for the possible selection of a new auditor for the 2025-2027 triennium. The selection criteria will be similar

to those used in a search conducted during 2017. Firms will be evaluated by criteria such as price, capability, financial stability, expertise, staff turnover, and industry reputation.

3. Enterprise Risk Assessment

The Committee continued to receive updates regarding a range of risks the Society faces. The Committee received reports on all insurance coverage purchased by the Society and received reports outlining practices to minimize risks associated with labor, property and information technology.

JOINT BUDGET COMMITTEE

Members

The Rev. Patty Downing, Chair	Delaware, III	2024
The Rev. Hickman Alexandre	Long Island, II	2024
La Rvda. Gina Angulo Zamora	Litoral Ecuador, IX	2024
The Rt. Rev. Thomas J. Brown	Maine, I	2024
The Reverend Canon J. Michael Ehmer	Northwest Texas, VII	2024
The Rt. Rev. Jeff W. Fisher	Texas, VII	2024
Mr. William Fleener, Jr.	Western Michigan, V	2024
Mr. Timothy Gee	El Camino Real, VIII	2024
Ms. Tess Judge	East Carolina, IV	2024
Ms. Louisa J. McKellaston	Chicago, V	2024
The Rev. Canon Dr. Wilmot T. Merchant II	South Carolina, IV	2024
Ms. Dianne Audrick Smith	Ohio, V	2024
The Rt. Rev. Susan Brown Snook	San Diego, VIII	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Rev. Canon Dr. Michael Barlowe, Ex Officio	California, VIII	2024
Mr. N. Kurt Barnes, Ex Officio	New York, II	2024
The Most Rev. Michael Bruce Curry, Ex Officio	North Carolina, IV	2024
Mr. Patrick J. Haizel, Staff	New York, II	2024
Mrs. Nancy Caparulo, Staff	Newark, II	2024

Acknowledgements

The Joint Budget Committee would like to thank the members of the DFMS staff and the church for their assistance in charting this new process of creating the budget for the Episcopal Church. We also want to thank the member of Program, Budget, and Finance for their tireless work in the past to craft budgets that reflect the mission and ministry of Jesus Christ that the Episcopal Church is engaged in pursuing.

Mandate

Executive Council Bylaws Section 2.d.

- a.
 1.
 - i. There shall be a Joint Budget Committee of the Executive Council which, pursuant to the Constitution and Canons of The Episcopal Church, shall, with the Chair and Vice-Chair and the Council, develop an Episcopal Church Budget consistent with the resolutions of the General Convention, for each budgetary period, which budgetary period shall be equal to the period between the January 1 following the adjournment of the most recent meeting of the General Convention and ending with the December 31st following the adjournment of the next regular meeting of the General Convention.
 - ii. The Chair of the Budget Committee shall be jointly nominated by the Chair and Vice Chair and appointed by Council.
 - iii. The members of the Budget Committee shall be jointly nominated by the Chair and Vice-Chair and appointed by Council, and shall include: one member of each Executive Council Joint Standing Committee, and at least five and not more than seven other individuals who may or may not be members of Council, including individuals with financial and budgetary expertise, and, further, the membership shall represent the diverse voices of the Church and a balance of the Church's orders consistent with the historic polity of the Church. The Treasurer and the Executive Officer of the General Convention shall be members *ex officio*. The members shall serve a term beginning at the first regular meeting of Council following the regular meeting of the General Convention or immediately following their appointment, whichever comes later, and continuing through December 31 following the adjournment of the next regular meeting of the General Convention or until a successor is appointed, and may serve two consecutive terms, after which a full interval between regular meetings of the General Convention must elapse before being eligible for reappointment.
 - iv. In the development of The Episcopal Church Budget, pursuant to the Constitution and Canons of The Episcopal Church, the Budget Committee shall solicit input from Interim Bodies, Executive Council Joint Standing Committees, the Society's staff, and other interested parties, and shall further establish a timeline for preparation of The Episcopal Church Budget that shall include appropriate time for open and accessible hearings prior to the presentation of the completed Episcopal Church Budget for acceptance by the Council and subsequent submission to the Secretary of the General Convention; such timeline shall be published to the church at large through the General Convention Office.

- v. Following the completion of each regular meeting of the General Convention and at least thirty (30) days prior to the first regularly scheduled Council meeting, the Budget Committee shall consider all resolutions with budgetary impact and shall make adjustments to The Episcopal Church Budget for consideration by Council pursuant to the Constitution and Canons of The Episcopal Church.
 - vi. The Budget Committee shall meet as necessary (but not necessarily concurrently with Council) and shall provide an informational report to the Joint Standing Committee on Finance at each regular meeting of the Council.
- b. Every committee shall provide in writing an annual report to the Council of its work and activities.

Summary of Work

Enter here a summary of the work the group did and any recommendations the group wants to make. Please see the “Blue Book Report Instructions” for information on formatting.

The Joint Budget Committee of Executive Council (JBC) began its work on the 2025-2027 budget at a meeting held at the Maritime Institute in Baltimore Maryland (February 1-3, 2023). At that meeting we established our norms, appointed an executive committee (The Reverend Patricia Downing, Ms Dianne Audrick Smith, The Right Reverend Susan Snook, and Mr. William Fleener), we roughed out a timeline for our work, agreed that the 2025-2027 budget would utilize the same format as the current budget, divided ourselves up into four subgroups (Mission within and beyond, Income, Presiding Bishop’s Ministry, Governance), and reviewed the current budget in detail. Additionally, we set our meeting schedule. We agreed to have executive committee meetings via zoom on the second Monday of the month (noon eastern time) and full committee meetings via zoom on the fourth Monday of the month (noon eastern time).

We publicized a list of questions pertaining to the budget priorities to the church for their feedback. We held a listening session, via zoom on Monday April 17th (4pm to 6pm eastern). Responses to the questions and comments from those attending the Listening session were posted on the JBC page of the General Convention website and distributed to all members of the JBC.

At the end of May we received from DFMS staff a rough draft of the 2025-2027 budget. JBC met via zoom on June 8th, 2023, to review those figures. At the June 8th meeting we agreed on a series of assumptions about income and expenses that would govern our work.

June 20th, 2023, we held a churchwide listening via zoom (7pm – 9pm eastern) session specifically on the income side of the budget. JBC received feedback from the church.

At the June meeting of the Executive Council, a request was made by the JBC for a dedicated time for conversation with the Executive Council to hear from them about the assumptions we were using on income. That meeting was held, via zoom, on Friday June 30th (noon to two pm eastern). We emerged from that discussion with the following:

Diocesan assessments would remain at 15%

The calculation of diocesan giving would have a 2% increase per year due to increased income in dioceses by that same 2%.

We were comfortable with both the calculation of a 7.5% annual return on investments and the usage of a 5% draw on a 5-year rolling average of those investments.

June 30th, 2023, a letter was sent from the JBC to the Presiding officers of DFMS asking for a revised budget. That revised budget was received by JBC on July 26th. Having received the revised budget, the subcommittees began their work to fully understand the proposed budget by having conversations with DFMS staff. A request was made to Interim bodies to submit their budget requests to the JBC.

Next steps in the process:

The JBC will meet October 4-6th at the Maritime Institute in Baltimore to finalize the draft 2025-2027 budget. That draft budget will be presented to the Executive Council at their October meeting in Panama City Panama. If the draft budget is approved by the Executive Council, it will be made public, and the church will be invited to make comments upon the budget. The JBC will hold zoom hearings during the months of November and December to hear from the Church. January of 2024, the JBC will meet at the Maritime Institute in Baltimore to finalize the budget. That final budget will be presented to the Executive Council at their January meeting. If approved, the Executive Council will send the 2025-2027 budget to the Secretary of General Convention.

UNITED THANK OFFERING BOARD

Members

Ms. Sherri Dietrich, President	Maine, I	2024
Ms. Joyce Landers, Vice-President	Central Gulf Coast, IV	2024
Ms. Lorraine Candelario	Puerto Rico, II	2024
The Rev. Dr. Caroline Carson	New Jersey, II	2027
Ms. Daria Condon	Kansas, VII	2027
Ms. Rosamond Daniels	Washington, III	2021
The Rev. Caitlyn Darnell	North Carolina, IV	2021
Ms. Gail Donovan	Michigan, V	2024
Ms. Karin Elsen	Colorado, VI	2027
Ms. Sedona Jacobson	Navajoland, VIII	2024
The Rev. Rowan Larson	Massachusetts, I	2027
Ms. Kate Mietus	Spokane, VIII	2024
Ms. Maggie Noland	Alabama, IV	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	

Changes in Membership

Ms. Rosamond Daniels' term expired; she was replaced by Ms. Mathy Milling Downing, Maryland, III

The Rev. Caitlyn Darnell's term expired; she was replaced by Ms. Erin Sample, Indiana, IV

Ms. Kate Mietus resigned; she was replaced by Ms. Sedona Jacobson, Navajoland, VIII

Ms. Maggie Noland was elected secretary; she was replaced by Ms. Linda Kennedy, Alabama, IV

Ms. Molly Minnerath, Massachusetts, I, joined as our second young adult member

Ms. Laura Jackson, Illinois, V, joined as our second appointed member

Mr. Joe McDaniel, Jr., Florida, IV, was appointed as our Executive Council liaison in 2022

Karin Elsen is the president-elect and Rowan Larson is the vice-president-elect; they will take office at the end of General Convention in 2024

Representation at General Convention

Sherri Dietrich and Joyce Landers are authorized to receive amendments to this report at GC.

Mandate

The United Thank Offering (UTO) is a ministry of The Episcopal Church for the mission of the whole church. Through UTO, individuals are invited to embrace and deepen a personal daily spiritual discipline of gratitude. UTO encourages people to notice the good things that happen each day, give thanks to God for those blessings and make an offering for each blessing using a UTO Blue Box. UTO is entrusted to receive the offerings, and to distribute 100% of what is collected to support innovative mission and ministry throughout The Episcopal Church and Provinces of the Anglican Communion.

Summary of Work

UTO's ministry of gratitude is 130 years old and our familiar Blue Boxes are nearly that old, but UTO's work continues to change as the Church and the world change. When UTO was founded in 1898 it was safe to assume that Episcopalians attended church regularly and contributed financially to their parishes and beyond. As we know, that had been changing for decades and the COVID pandemic dramatically accelerated that change in our parishes and in patterns of Episcopal financial contributions. Although UTO still encourages and promotes parish- and diocese-level gatherings, we have broadened our messaging to support and enable gratitude practices and gatherings on the individual level so that we include all of those people who don't attend services regularly but still love and serve God. UTO believes that gratitude goes with everything, so we partner with many other Episcopal Church groups and ministries to promote both groups because what strengthens one part of the Church strengthens the whole Church.

In the past triennium UTO has offered many well-attended webinars, training days for members and leaders, promoted The Great EpisGOPal Race, lead book study groups, strengthened the UTO community of grateful people, and collected millions of dollars in gathering donations and distributed that money in grants throughout the Episcopal Church and Anglican communion. Because UTO values knowledge, accountability, and transparency around our work, we began publishing annual reports in 2018 that cover our work in greater depth. Please go to <https://unitedthankoffering.com/annualreport/> to read our latest annual reports and discover more about UTO's work over the past several years.

REPORT ON RESOLUTIONS REFERRED TO DIOCESE

Forty-two (42) dioceses responded to resolutions referred for action or consideration after the 80th General Convention, as recorded below:

Resolutions Referred for Action or Consideration		Action Completed	Action Ongoing	No Action
A003	Uniform Paid Family Leave Policy	9	21	11
A016	Adopt, Study, and Promote Guiding Principles for World Mission & Initiate Global Mission Advocate Program	6	18	17
A020	Support Decade of Action to Achieve Sustainable Development Goals	4	21	14
A021	Support for the United Nations	4	22	16
A028	Join, Participate, and Fund The Global Episcopal Mission Network	8	15	19
A032	Amend Canon III.11.9.b to Correct an Oversight in a 2018 Canonical Amendment	20	6	11
A040	Specify Electronic Transmission of Certain Documents and Records	23	6	8
A042	Permitting Sending Required Notices and Other Papers by Electronic Means	24	7	6
A044	Amend Canon IV.14.4 Provisions for Notices of Accords	21	8	9
A045	Amend Canon I.19.2.b to Update a Word	26	6	6
A048	Amend Canons and Rules of Order to Implement the Recommendations of the Task Force on the Budget Process	22	8	8
A050	Support collaborative efforts with Equal Justice Initiative (EJI) to place historical markers	2	22	17
A053	Ensure the vital role of the Episcopal HBCUs in building The Beloved Community	3	19	20
A055	Receive and Study Proposal of Ecumenical Dialogue with Presbyterians (PCUSA)	7	14	16
A060	Endorse Guidelines for Expansive and Inclusive Language	9	19	9
A061	Amend Canon I.4.6.j to include data regarding gender	19	10	8
A062	Requiring Dioceses to Create a Plan to Narrow Gender Gaps	4	24	13
A068	Safe Church Training	22	15	5
A073	Encouraging Faithful, Ethical, and Responsible Investing	11	25	5
A075	Resolution Amending Canon IV.5.4 Provision for the Court of Review	21	8	9

Report to the 81st General Convention

A076	Resolution Amending Canon IV.15.2 Provision to serve Notice of Appeal	20	9	9
A077	Resolution Amending Canon IV.15.3 Provision to serve Notice of Appeal by Bishop Diocesan	20	8	9
A078	Imagining a Church Grounded in Social Justice as Christian Ministry	5	25	11
A081	Amend Canon III.11.1a regarding Standing Committee's Role in Episcopal Elections	21	9	7
A082	Amend Various Canons Regarding Preparation of Medical and Psychological Evaluation in the Ordination, Episcopal Election, and Reception Processes	20	10	8
A087	Net Carbon Neutrality by 2030	4	23	14
A088	Commit to the Pressing Work of Addressing Global Climate Change and Environmental Justice	4	28	9
A090	Allies for Recovery in the Episcopal Church	3	24	14
A092	Churches Beyond Borders	15	12	10
A093	The Episcopal Church-United Methodist Church Dialogue	6	16	15
A094	Affirm Ongoing Work and Dialogue with Ecumenical Partners	11	15	11
A095	Celebrate and Support the Planting of New Episcopal Communities	4	25	12
A096	Develop Sustainable Congregational Revitalization Ministries	13	16	8
A103	Describing a Christian Life of Faith in the Episcopal Tradition	6	18	13
A107	Ministry with People with Mental Illness and Their Families	4	28	9
A109	Developing Curriculum and Required Training for Clergy in Mental Health Pastoral Care	2	19	20
A116	Amend Canon III.10.2 to Correct Inadvertent Omission on Clergy Ordained in Churches in Full Communion	22	8	8
A117	Amend Canons III.10, III.12.1, III.12.5.b.3, and III.13.1 to Clarify Language on the Reception of Bishops	20	7	10
A118	Amend Canon IV.5.4 on the Election of Members of the Court of Review	22	6	10
A119	Amend Canon IV.17.3 and .4 on the Term of Office for the Disciplinary Board for Bishops	23	7	8
A120	Amend Canon IV.17.8 on Vacancies on the Court of Review for Bishops	21	8	9
A125	A Resolution Extending and Furthering the Beloved Community	10	14	12
A131	Resolution Regarding Language	10	22	10

Report on Resolutions Referred to Diocese after the 80th General Convention

Report to the 81st General Convention

A133	Amend Joint Rule of Order III.12 to modify the method of showing additions or amendments to facilitate translation	21	10	7
A135	Amend Joint Rule of Order VII.22 to Streamline the Procedure for Obtaining a Background Check, if Required, before a Nomination from the House Floor	21	9	8
A137	Church of Sweden - Full Communion Relationship	15	10	12
A140	Urge The Episcopal Church and Constituents to Designate Indigenous Peoples GÇÖ Day	10	22	9
A144	Add Updated Editions of NRSV and New Jerusalem Bible to Canon II.2	18	9	10
A145	Amend Constitution Article X [Book of Common Prayer Supplementary Text--Second Reading]	21	9	7
A146	Amend Constitution Articles VI and VIII [Regarding Full Communion--Second Reading]	22	7	9
A147	Amend Article IX [Court of Trial for Bishops--Second Reading]	23	7	8
A148	Amend Constitution Article I.2 [House of Bishops--Second Reading]	24	6	8
A149	Amend Constitution Article II.4-8 [Bishops Suffragan--Second Reading]	21	7	9
A150	Amend Constitution Article III [Bishops Consecrated for Foreign Lands--Second Reading]	22	7	9
A151	Amend Constitution Article IV [Standing Committees--Second Reading]	22	6	9
A152	Amend Constitution Article 5.1 [Admission of New Dioceses--Second Reading]	24	6	8
A153	Amend Constitution Article IX [For the Trial of Presbyters and Deacons--Second Reading]	22	7	9
A161	Addressing the Burden of Medical Debt	5	15	19
Bo02	Let there be sight! - Proposal for Episcopal Church Assistance in Yemen and funding for an Ophthalmologist Medical Director at the Ras Morbat Eye Clinic in Aden	11	8	18
Bo03	Regulating Ghost Guns and 3D Printed Guns	7	18	16
Bo04	Establishing Religious Life Sunday	6	14	20
Bo06	Investing in State-Level Gun Violence Prevention Advocacy	10	19	12
Bo07	Investment in Community Violence Intervention to Prevent Gun Violence	5	24	12
Co04	Inclusion of June 19th, "Juneteenth" in the Church's Liturgical Calendar in Recognition of the End of Slavery in the United States	16	11	9

Report to the 81st General Convention

C007	Designate March 10 as the Date to Commemorate Harriet Ross Tubman	13	10	14
C009	Mandates Anti-Racism & Racial Reconciliation Training for the House of Deputies	10	24	8
C023	On Commemorating the Rt Rev Barbara Harris	17	9	11
C033	Encourage Sacred Ground Curriculum	15	20	7
C054	Address the issue of Voter Suppression	4	19	19
C063	Participate in Thursdays in Black	2	17	22
C064	Break the Silence Sunday	2	22	17
C070	Amend Canon III.9.5.d	24	7	7
C072	Land Acknowledgment	7	26	9
D023	Support for Care Workers	3	17	20
D029	Affirming Non-Binary Access and Leadership	12	21	9
D046	Supporting Child Welfare Systems and Foster Care	3	18	20
D048	Supporting Public Investment in Post-High School Education and Training	4	15	22
D050	Reunion of the Dioceses of The Episcopal Church in North Texas with The Episcopal Dioceses of Texas	22	6	10
D052	Amending Canon III.11.8 regarding Objections to Episcopal Elections	21	8	9
D056	Amend Canon III.11.9.a to correct cross-reference	21	8	8
D063	Support for Truth to Confront Misinformation and Violence	10	15	12
D064	Endorse and Encourage Green Deal Legislation	3	25	13
D066	Addressing restrictions on access to gender affirming care	5	21	15
D070	Addressing Inequities in the Quality of Life of Native Peoples	3	24	14
D072	Resolution on Gender and Sexuality Training	2	17	22
D083	Addressing the erosion of reproductive rights and autonomy	11	12	14
D090	The Church's Teaching on Racism	9	27	5
D091	Defining Equal Place in the Life of the Church	10	21	10
D093	Broad Representation in Discernment Processes	9	24	8
D094	Reaffirming the Role of Ethnic Ministries	7	25	9
D098	The Promotion of Public Health	4	20	17

EXECUTIVE COUNCIL AND CHURCH PENSION GROUP MEMORANDUM OF UNDERSTANDING GROUP

Report respectfully submitted: January 27, 2024

Members

Executive Council Members

Devon Anderson (Co-Convenor)

Thomas Chu

Kent Anker

Anne Hodges-Copple

Michael Barlowe

Aaron Perkins

Annette Buchanan

Church Pension Group Members

Rosalie Simmonds Ballentine

Brian Prior

Diane Jardine Bruce

Greg Rickel

Ryan Kusumoto

Nancy Sanborn

Kathryn McCormick (Co-Convenor)

Mary Kate Wold

Mandate

On April 12, 2022, the Presiding Bishop and the President of the House of Deputies on behalf of the Executive Council and the Chair of the Board of Trustees on behalf of The Church Pension Fund (CPF) Board of Trustees agreed to a Memorandum of Understanding (MOU): a coming together during the 2022-24 biennium to share information, insights, and ideas to help each organization plan for the future, and address respective policy concerns posed by changing demographics, changing expectations of and for clergy and lay employees, and changing understandings of church in society.

The objective of the group was to provide opportunities for two-way conversation between Executive Council and the CPF Board of Trustees on major issues of mutual concern between meetings of General Convention.

- The document parsed out 10 topics for conversation during the biennium. These topics included:
- current and projected demographics of clergy and lay employees,
- clergy and lay compensation and issues around parity,
- Church Insurance companies including areas of tension with injured parties,
- Emerging risk factors resulting from climate change and empty churches,
- CPF investment performance,
- Feasibility and costs of, and obstacles to, implementing paid family leave, and
- the effects of pension, health care, disability, and other benefit plan rules, rates, and
- practices on clergy and lay professional recruitment and deployment, as well as on diocesan and congregational health and sustainability.

Meetings

Per the instructions of the MOU, the group met four times, three times in person and once on Zoom on the following dates:

- April 28-29, 2023 (in person)
- October 18, 2023 (Zoom)
- December 5, 2023 (in person)
- January 25, 2024 (in person)

Work

The group was faithful to the MOU, working its way down the list of 10 desired conversations~~s~~-topics over four meetings. Where applicable, the group received in-depth reports and presentations that preceded conversation and questions. Arguably more importantly, relationships were built intentionally with each other, across the two boards. We came to know each other as colleagues, fellow Episcopalians, Christians on the Way, and friends. At the conclusion of our last meeting, the group acknowledged that the relational breaches and conflicts that inspired the need for the MOU were felt to have been resolved and communications opened.

Finally, the MOU included a mandate that the Presiding Officers be invited to present at a CPF Board meeting (which occurred in early December 2023) and that the CEO and Board of Trustees Chair of the CPF Board of Trustees be invited to present at an Executive Council meeting (which occurred in January 2024).

Recommendations

Establish an Advisory Group

We recommend the bringing together of “top level strategic advisory” leadership across the church to discuss some of the comprehensive issues affecting the church as a whole and to offer itself to Executive Council and the Presiding Officers as thought partners in visioning and strategic planning for the whole church.

We suggest as partners the leaders of the following entities:

- Church Pension Group, CEO
- Episcopal Church Foundation, Executive Director
- Council of Episcopal Seminary Deans, Chair
- Episcopal Relief and Development, CEO

and others as needed.

The work of the Executive Council is to establish a structure within the church to engage with these partners in future strategic planning initiatives.

We encourage a movement from conversation to action with particular issues and share with the wider Episcopal Church issues that surfaced in this group. These include:

- a. Overall compensation for lay and clergy employees.
- b. Compensation for non-stipendiary clergy, including as it relates to the access to programs related to wellness such as CREDO and other programs related to financial planning and insurance.
- c. Addressing the needs of the lay employees and clergy who are not eligible for CPG benefits.

To that end, we recommend that these issues be referred to a specific joint standing committee of Executive Council, inviting CPG and other experts to consult as needed.

Interim Body to Work on Lay Compensation Parity

The group discerned that there needs to be an intentional focus on the needs of lay employees, especially as it relates to compensation and parity within the church. We tasked members of our group to write a resolution using the template for creating an Interim Body and including a rationale, based

on the model of the task forces on family leave and denominational health plan. The proposed resolution appears at the end of this report.

Continuing the Work Done by the MOU Group

The group was unanimous in recommending that the work done by the MOU group should continue and that we continue to find ways to maintain and strengthen the relationship between Executive Council and CPG. The group was not of one mind, however, that the work should continue as another MOU group. However, we are all in alignment that a) communication should continue informally based on relationships established, b) with senior leadership e.g. CEO & PB, visiting each other's board meetings when appropriate to address mutually relevant issues, c) the senior leadership of CPG engage with Executive Council, and *vice versa*, on issues relevant to the two organizations, enabling a flow of information and insights. Most importantly, we need to ensure that there is a more continuous exchange between CPG and Executive Council on issues relevant to the two organizations.

Proposed Resolution

A138: Task Force on Parity and Equity of Lay Compensation and Benefits

Resolved, That the 81st General Convention call upon the Presiding Bishop and the President of the House of Deputies to appoint a task force consisting of three (3) Bishops, (3) Presbyters or Deacons, and (6) lay persons who represent a wide range of expertise in church employment and church employment benefits for both lay people and clergy including Episcopal schools, parishes, dioceses, and other Episcopal entities. The task force shall, in consultation with the Office of General Convention and the Church Pension Group, study and report on issues regarding parity and equity of lay compensation and benefits across The Episcopal Church, including regional differences, and those based on part-time status, race, gender, class, LGBTQ+, position, authority, nature of institution (school, church, etc.) for consideration of the 84th General Convention.

Resolved, That the 81st General Convention request a budget allocation of \$40,000 for this task force, to include one in-person meeting and resources for outside consultation.

HOUSE OF BISHOPS COMMITTEE ON THEOLOGY

Membership

The Rt. Rev. Allen K. Shin, Chair	New York, II
The Rt. Rev. Jennifer Baskerville-Burrows	Indianapolis, IV
The Rev. Dr. Michael Battle	New York, II
The Rt. Rev. Larry R. Benfield	Arkansas, VII
The Rt. Rev. Thomas Breidenthal	Southern Ohio V
The Very Rev. Dr. Kelly Brown Douglas	Maryland, III
The Rev. Dr. Craig Geevarghese-Uffmann	Rochester, II
Dr. Stephen Edward Fowl	Maryland, III
The Rt. Rev. R. William Franklin	Long Island, II
The Rt. Rev. Carol Gallagher	Massachusetts, I
The Rt. Rev. Shannon MacVean-Brown	Vermont I
The Rev. Dr. Altagracia Perez-Bullard	New York, II
The Rt. Rev. Gretchen Rehberg	Spokane, VIII
The Rt. Rev. Prince G. Singh	Rochester, II
The Rev. Dr. Katherine Sonderegger	Virginia, III

Summary of Work

The House of Bishops Theology Committee is appointed by the Presiding Bishop and serves as a resource to the bishops as they pursue their teaching ministry in the church. At present, the committee comprises nine (9) bishops and seven (7) academic theologians. The previous report on Beloved Community was published by Church Publishing under the title, *Realizing Beloved Community* in 2022. At the House of Bishops gathering during the 2022 General Convention, the Presiding Bishop asked the Committee to take up Christian nationalism as the next issue for theological investigation. The bishop members held an initial meeting during the General Convention gathering. The organizational meeting on this issue was held online in October and November 2022, followed by a hybrid meeting in Indianapolis in January 2023. The Committee submitted the first interim report to the House of Bishops gathering in March 2023. We recognized the complex and elusive nature of Christian nationalism and the large scope of this issue that easily took our conversations in many different directions. Christian nationalism in the United States has deep roots in white supremacy, even though it cuts across all racial, ethnic, and cultural groups today. Thus, “Christian” in Christian nationalism is not so much about a religious faith as an ideologically driven identity, even though religious beliefs are cleverly deployed to support its ideological stance on certain political and social issues. In the United States, the ideology of Christian nationalism consists of assumptions about white

supremacy, Anglo-Saxon nativism, patriarchy, and militarism. Two more subsequent meetings were held with an online meeting in April 2023 and another hybrid meeting at the Episcopal Church Center in New York City in June 2023. The Committee plans to hold an online meetings in December 2023 and in March 2024 in order to submit the report in time for the House of Bishops gathering at the 2024 General Convention. The final report will explore the issues of the historical theology, the Eucharistic and the baptismal theology, the Scripture, the Christian identity, disenfranchisement and isolation, the faith-based Community organizing, a case study and a global view. Christian nationalism is a sin that distorts our relationship with God and with one another.

Respectfully submitted by: The Rt. Rev. Allen K. Shin

PRESIDING BISHOP'S COUNCIL OF ADVICE

Members

The Most Rev. Michael Curry, Chair	North Carolina, IV	2024
The Rt. Rev. Kevin Brown	Delaware, III	2024
The Rt. Rev. Brian Cole	East Tennessee, IV	2024
Rev. Dr. DeDe. The Member	Central New York, II	2024
The Rt. Rev. Douglas. Fisher	Western Massachusetts, I	2024
Rt. Rev. Matthew A.. The Member	Fond du Lac, V	2024
The Rt. Rev. Cristobal Lozano	Litoral Ecuador, IX	2024
The Rt. Rev. Kimberly Lucas	Colorado, VI	2024
The Rt. Rev. Jake Owensby	Western Louisiana, VII	2024
The Rt. Rev. Gretchen Rehberg	Spokane, VIII	2024
Rt. Rev. Diane Jardine. The Ex Officio	Los Angeles, VIII	n/a
The Rt. Rev. Mary Reeves, Ex Officio	North Carolina, IV	n/a

Changes in Membership

Bishop Jacob Owensby of Province VII left in 2023 and was replaced by Bishop Jeff Fisher of Texas

Bishop Ian Douglas of Province I left in 2021 and was replaced by Bishop Douglas Fisher of Western Massachusetts

Bishop William Klusmeyer of Province III left in 2022 and was replaced by Bishop Kevin Browne of Delaware

Bishop Robert Wright of Province IV left in 2021 and was replaced by Bishop Brian Cole of Eastern Tennessee

Mandate

Rules of Order: House of Bishops XXVII

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

Summary of Work

The Council usually meets as part of each House of Bishops Meeting and one additional time each year, however in the last Triennium the Council met virtually on the following dates:

March 23, 2021

March 29, 2021

August 16, 2021

December 7, 2021

May 9, 2022

October 31, 2022

December 11, 2023

December 21, 2023

HOUSE OF DEPUTIES COMMITTEE ON THE STATE OF THE CHURCH

Roster

Ms. Kathryn Nishibayashi, Chair	Los Angeles, VIII	2024
The Rev. Rowan Larson, Vice-Chair	Massachusetts, I	2024
Ms. Karma Quick-Panwala, Vice-Chair	California, VIII	2024
Deputy Nathan Brown, Secretary	Washington, III	2024
The Rev. Erin Betz Shank	Northwestern Pennsylvania , III	2024
The Rev. Megan L. Castellan	Central New York, II	2024
Dr. Dawn Conley	Arizona, VIII	2024
The Rev. Angela Goodhouse	North Dakota, VI	2024
Lillian Hardaway	Virginia, III	2024
Brother Luis Enrique Hernández Rivas	New York, II	2024
Lauren Kay	Maine, I	2024
The Rev. Milquella Mendoza	Dominican Republic, IX	2024
The Rev. Dr. Nina Ranadive Pooley	Western Massachusetts, I	2024
The Rev. Nelson Serrano Poveda	San Joaquin, VIII	2024
The Rev. Kelly Steele	Georgia, IV	2024
Ms. Evangeline Warren	Ohio, V	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
Adia Milien, Representative of the President of the House of Deputies		2024
Mr. Michael Glass, Consultant	San Joaquin, VIII	2024

Changes in Membership

Angela Goodhouse did not participate in meetings, no reason given.

Acknowledgements

First, we wish to thank President Ayala Harris for being a source of wisdom and guidance as we undertook our work. Additionally, we wish to acknowledge Chancellor Michael Glass who served as a valuable consultant to our committee. We wish to acknowledge members of the following committees who we consulted with throughout our work: Task Force on Parochial Report Finance Page, Standing Committee on Structure, Governance, Constitution, and Canons, Task Force on the State of Membership, and the previous HOD State of the Church committee. We also wish to thank those in the wider church who emailed feedback to us with input on the parochial report.

Mandate

Our work as a committee was guided by two mandates: one from Canon I.6.5.b “A Committee of the House of Deputies shall be appointed following the close of each General Convention, to serve ad interim, and to prepare and present to the next meeting of the House of Deputies a report on the State of the Church; which report, when agreed to by the said House, shall be sent to the House of Bishops.”

Our second mandate came directly from the President of the House of Deputies, Julia Ayala Harris, who, when she formed this committee, charged us to focus on the following: “To address how the pandemic has accelerated the pace of change...we have found that the future church is already upon us. As a church, what have we learned as we adapted to the pandemic and post-pandemic life? What questions do we need to be asking ourselves as we move into our future?”

President Ayala Harris has used three lenses to guide her leadership: accessibility, inclusivity, and safety. We as a committee felt that these were important priorities to consider as we discerned the State of the Church.

Review of Prior Work and how it informed our work

We began our work by reviewing what the previous State of the Church committee had worked on to see where there might be areas that our committee could build on. However, we were also mindful that we had a shortened time frame compared with previous iterations of this committee and could not address as many areas as we would have liked. Like the previous committee, we also spent time discussing what it means to belong to or be a member of an Episcopal Church, but we could not delve too deeply into it, though we did have conversations with the Task Force on the State of Membership in The Episcopal Church around what it means to be a “communicant in good standing.” It seemed like that task force was better equipped to address the issue more fully. The areas that we were able to build upon—but not fully address— included the lack of research capacity, improving the quality of data received through said research, and the need for greater tools for digital collaboration in TEC. Additionally, we used the previous committee’s desire for further expansion of what encompasses “church ministry”, especially those not traditionally captured by worship services, to inform some of the changes we proposed for inclusion in the parochial reports

Current Work

Meeting dates

The committee met in person in Linthicum Heights, MD November 14—17, 2022. The committee also met via Zoom on December 17, 2022, January 31, March 15, April 27, June 28, August 3 and October 19, 2023.

Subcommittee on Resources

When our full committee met for the first time in November 2022 in Baltimore, we established three committees, each employing a different focus through which to wrestle with the mandate set before us.

When thinking about what kind of questions The Episcopal Church needs to ask itself as we move into our future, the Subcommittee on Resources took a particular interest in our church's stewardship and use of resources of all kinds. While financial and material resources are an important consideration, we also considered staffing, land use, ways of thinking, and the gifts and skills that lay and ordained leaders in our church bring.

We feel that using the focus of “resources” helps keep in mind what it takes to keep The Episcopal Church going and able to move into the future. President Ayala Harris’ guiding principles of accessibility, inclusivity, and safety mean nothing without a church left to embody them.

Therefore, we have proposed four questions for The Episcopal Church to consider.

1. What can we put down?
2. Are we being as transparent as possible with the resources that we have?
3. What does system breakdown cost us in material and immaterial resources?
4. How could we reimagine using the resources we have to better facilitate collaboration on all levels: parish, diocesan, and within and beyond the whole Episcopal Church. How do we encourage partnership and mutual ministry before organizations (parishes, dioceses, etc.) are on the brink of collapse?

The first question that this subcommittee recommends The Episcopal Church ask itself is: “**What can we put down?**” In other words, what can we stop doing, or begin to do in a different way that’s better adapted to our present reality?

As leaders in our own contexts across the Church, subcommittee members have noted the ways in which The Episcopal Church is changing, and the ways that the pandemic has accelerated some of those changes. Many Episcopalians look at these changes and fall into a scarcity mindset, focusing on

decline. We recognize that this question, “What can we put down?” may sound like it comes from a place of scarcity. However, our thinking behind this question is about prioritizing what we do so that we can do it to the best of our ability; to be able to bring an abundance mindset to what it is that we have discerned is most important to continue to do as the future of the church is upon us.

Each year at Diocesan Conventions and every Triennium at General Convention, resolutions are adopted that call for the Church to do more and more things. It is much less common for a resolution to be adopted that asks the church to be doing less. By doing more and more without thinking about what work is no longer ours to do, we take our limited resources as a Church and stretch them more thinly each year.

This is no easy task; [research has shown](#) that when faced with a problem to solve, people are much more likely to try to add something to fix the problem rather than take something away, even when the subtractive option is obvious.

We invite the Church to ask itself on all levels what we can stop doing. One way forward would be to look back at the recommendations that the [Task Force for Reimagining the Episcopal Church \(TREC\) made to General Convention in 2015](#) and considering if we have met the adopted recommendations or if there are others that make even more sense in 2023 than they did in 2015.

The second question the Subcommittee on Resources recommends that The Episcopal Church, dioceses, and congregations and worshipping communities consider is: **“Are we being as transparent as possible with the resources that we have?”**

When determining the capacity of the whole Church to continue to do the work of the Jesus Movement in 2023 and beyond, it is imperative that all the scope of our resources is known and easily accessible.

While there have been some attempts to map resources, such as the [Episcopal Asset Map](#), which maps our buildings, ministries, and other resources, and the General Convention Office’s [Study your Neighborhood](#) tool, using data from the annual Parochial Report, we believe that there are likely ways in which The Episcopal Church, our dioceses, and our congregations and communities can be more transparent about the resources that they steward.

As one subcommittee member who is on their Diocesan Budget Committee notes, while much of the data about the financial resources of The Episcopal Church is out there, it is not easily accessible or easy to understand without a background in finance and deep experience with the way financial data is reported. We recommend that The Episcopal Church consider making all its data, especially its financial resource data, more accessible and easier to understand, which we believe will help future State of the Church committees and other governing bodies be able to ask difficult questions which need to be asked.

The third question the Subcommittee on Resources recommends the Church ask itself is: **“What does system breakdown cost us in material and immaterial resources?”**

What does it cost us when there is a breakdown in the canonical systems of the church? There is often the hidden cost of lawsuits and legal fees, especially when the system breakdown leads to real harm for Episcopalians and others. However, the true cost of such challenges is unknown by most of the church.

What does it cost us when churches slip through the cracks, and instead of needing a smaller intervention, end up needing a much larger infusion of resources—of diocesan staff time, of money, and more?

This question does not have a clear answer—related to the previous question on transparency—but it leads to an interesting thought experiment on how our systems might be adjusted to minimize resource expenditure when things go wrong.

The final question that the Subcommittee on Resources recommends The Episcopal Church consider is two-fold. **We wonder how we could reimagine the resources we have to better facilitate collaboration on all levels: parish, diocesan, and within and beyond the whole Episcopal Church.** The second part of this question is: **“How do we encourage partnership and mutual ministry before organizations (parishes, dioceses, etc.) are on the brink of collapse?”**

The number of dioceses in partnership continues to increase, as dioceses begin to collaborate and share resources, like the active partnership between Northwestern Pennsylvania and Western New York begun in 2018, the collaboration between the three dioceses of Northern New England that is beginning, and the proposed reunifications of the three dioceses in Wisconsin. In the last year, the two dioceses of Indiana and two Pennsylvania dioceses have also voted to begin considering possible reunification. Our subcommittee sees all of these collaborations and partnerships as a very good thing, especially when a partnership is begun while all parties are still in a strong financial position.

We hope that these brave collaborations between dioceses will inform other collaborations at all levels of the church. We acknowledge that true collaboration is difficult work. Trying new things, learning to think in new ways, and experiencing the changes in identity that result from collaboration takes dedicated and persistent commitment from leadership and buy-in from communities affected by the collaboration.

However, we would like to name that collaboration alone will not address the ongoing clergy shortage. Simply combining quarter time jobs to make a full-time job is not true collaboration. Artificial collaboration creates untenable positions across multiple parishes to be filled by one priest. This often adversely affects young clergy, clergy of color, women clergy, and queer clergy. We feel that we must name the ways that artificial collaboration does not lead to communities that are accessible, inclusive, and safe.

Healthy collaboration allows the Holy Spirit to move in new and empowering ways that were previously unimaginable, and there are examples for the church to look to within and beyond itself for inspiration.

During our time together as a committee, we solicited feedback from across the church on the Parochial Reports fielded in 2022 and 2023. Much of the feedback we received highlighted how onerous the Parochial Report has become, with a significant number of essay questions and a duplication of data that the Church collects through other research and data vehicles. With this in mind, we turned our attention towards revising the Parochial Report to become more streamlined and easier to complete. Recognizing that expansive and innovative thinking happens best when undertaken without constraint, we rebuilt the report from the ground up, starting from scratch and working together to understand which data might be of interest to the church to collect and, more critically, which data was appropriate for the Parochial Report *specifically* to collect. We celebrate the desire for greater knowledge and data collection across the Church, but we must balance this desire with the resources required to collect, fill out, and analyze the data in the Parochial Report.

The new version of the Parochial Report drafted by our subcommittee represents a compromise between our need for information about the state of the church and our care for the overworked parish administrators and clergy who take time to fill out these survey instruments. We have met with stakeholders across the Church to ensure that our new measures provide continuity with past surveys and that canonical reporting requirements are fulfilled. A key change to this parochial report includes the elimination of many of the clergy-related questions. We are able to accomplish this due to the robust data sharing infrastructure between the General Convention Office (GCO) and Church Pension Group (CPG). Other significant changes include the reduction of open-ended responses, which minimizes the resources required to complete the form as well as to analyze it, and updated language to measure racial diversity and age diversity in our parishes, information which is critical to our understanding of the health of the church. Finally, we included explainer text and definitions for terms that are unclear, ambiguous, or critically important, thereby eliminating the workbook.

Our hope is that this new version of the report will be fielded concurrently as an optional alternative to the current version in 2024 (capturing data from 2023) and that it will fully replace the current version in 2025 (capturing data from 2024). This multi-stage release allows us to minimize burden on parishes in 2025 who may have otherwise been surprised by the new questions and their structures and the year of overlap allows for data quality monitoring internally to ensure that continuity of data can be achieved for critical measures. The version included as an appendix at the end of this report has been adopted by Executive Council as the report of record. At the time of the writing of this report (Nov 2023), changes to the finance page have yet to be finalized and approved by this committee or Executive Council.

Making Data a Longer-Term Priority

As stated above, the committee's mandate includes analyzing the state of the church but found the parochial and diocesan report data to be insufficient for such analysis. We also share a desire to task professional data collectors and analysts with collecting the more onerous data that burdened the current parochial or diocesan report. Put simply, we have been asking the parochial report to do too much heavy lifting for our data needs.

Why does a church need good data and analysis? To make critical decisions regarding our health and potential weaknesses. We need to step beyond fear- and/or intuition-based decision-making at all levels of governance and move toward data-driven decision-making. In a time of enormous change, we wish to know exactly what is going on in and around our church to find answers to critical questions such as, but not limited to: "Where is our growth? Decline? Who is innovating well, and with what grant awards, if any? What can our demographic, financial, and/or numerical trends teach us about our faithfulness to God's mission? What has allowed recent church starts to flourish or fail? What people groups are being underserved and/or overlooked? How might we be able to track the flow of resources through the entire church? What can we faithfully let go to more fully embrace God's mission?" We seek information beyond anecdotal stories, good metadata on which we can pray and strategize about our collective future. The areas of The Episcopal Church which could benefit from this are unlimited.

To this end, we collaborated with the Standing Commission on Structure, Governance, Constitutions & Canons to explore methods of canonically instituting a new, long-term commitment to data collection and analysis. To quote the resolution explanation birthed from our partnership:

"When is the best time to plant a tree? Twenty years ago. When is the second-best time to plant a tree? Now. The Episcopal Church is woefully behind our sister denominations in the collection, study, and use of data for decision making at every level of the Church, and in a perfect world, this resolution would be designed to create a high-level staff position for such work. Given the realities of a new Presiding Bishop who will want to organize their own staff, this stop-gap measure is presented to a) require the next Presiding Bishop to offer a full data analysis and b) urge the Church-wide structure, dioceses, congregations, committees, commissions, agencies, and boards to make use of data in their decision making. Outsourcing this work in the first triennium will allow the Presiding Bishop, the House of Deputies Committee on the State of the Church, and the Standing Commission on Structure, Governance, Constitutions, and Canons to take an iterative approach in understanding what data is helpful, how it is best collected, and in what form the report should be produced."

In sum, our intention is to show that the current House of Deputies Committee on the State of the Church, a very young and diverse group, supports this resolution and long-term investment. This committee has been charged with creating and adapting the parochial and diocesan reports and discerning the current state of ecclesial matters, and agrees with the urgent need to collect, analyze, and disseminate good data and conduct research decision-making from that data. The church, now more than ever, needs to evaluate its own processes and bring them into conformity with our true

realities and God's priorities. Parochial and diocesan reports are not sufficient to know the state of the church in full nor is that data easily accessible in a format for leaders at various levels. Good, accessible data is paramount; we see the limits of a transitory committee of non-experts writing and amending the parochial and diocesan reports as well as soliciting and receiving usable data from those reports. We wish to see a church-wide effort to employ more professional methods for conducting research and gathering and analyzing data. We envision, from this resolution, an enhanced ability to make more fully informed decisions at all levels of church governance to meet the challenges of our time.

Subcommittee on Discipline

Title IV

As part of the discernment of the State of the Church Committee, it was impossible for us to overlook the current state of our Title IV procedures. While Title IV has been a significant step forward in fostering an environment of safety and accountability, we still have further progress to make to ensure a safer Church. A safe Church is directly related to the State of the Church. Most of us likely know several people who have left their respective Church homes after unfortunate encounters, feeling a lack of justice, a lack of safety, and feeling like their voices were not heard during an often-traumatic encounter. Recently, several high-profile Title IV matters have shown that, while we have taken important steps forward in ensuring that our churches are safe for all, we still have room for improvement.

First and foremost, this Committee concurs with the Presiding Bishop's determination that the issues surrounding Title IV require detailed reflection and review by the Standing Commission on Structure, Governance, Constitution and Canons. This body is best equipped to deliberate on the strengths and weaknesses of our current Title IV structure, and how to improve weak points in the Canonical framework that it lays out. We recognize, however, that this process will take time, and urge the Church to reflect on actions that can be taken now to ensure that every person can be assured that the Episcopal Church is a safe place for them, and that clergy at all levels will be held accountable for misconduct.

We encourage everyone interested in Title IV to submit their recommendations to the Standing Commission on Structure, Governance, Constitution and Canons, and to closely follow their work in the next triennium and continue to offer constructive feedback and comments as this process progresses. We all recognize that the Church is not a perfect institution, and Title IV will never be a perfect process, but by continuing to collaborate, we can create a stronger process that creates a safer church.

This committee recognizes that there are many mechanisms within the current Canonical framework that are not being fully implemented by the respective authorities. First and foremost, we urge

Ecclesiastical Authorities to use the powers granted to them in Canon IV.7.3 to place a cleric accused of misconduct on administrative leave and/or to restrict their ministry in some way when there is a reasonable concern about safety to and welfare of the Church. We particularly urge these actions to be routine when there is an allegation of harassment or sexual misconduct. It is important for us to remember that the powers granted in this Canon are temporary, and do not assume the guilt of the Respondent. Rather, its sole purpose in our Canonical framework is to ensure the immediate safety of our Church when there is an allegation, understanding that that allegation has not yet been proven or sustained. We cannot continue to strengthen the state of the Church without our congregations feeling safe in their churches.

This Committee also expresses its concerns about the disposition of cases where sexual misconduct is alleged and substantiated that were referred to pastoral response rather than continuing the Title IV process. While we recognize the important role that a pastoral response must play for both the Complainant and Respondent, we must also recognize that a pastoral response cannot be the sum total of our efforts towards accountability and reconciliation. Accountability, reconciliation, mercy, and justice are not mutually exclusive concepts in the Gospel, but rather, are all complementary and needed for true healing and safety in our communities. We have observed often that, with all the best intentions, the Church has sometimes sought to protect the reputation of the Church and provide grace to Respondents rather than providing support and justice to the Complainants. We believe these are not mutually exclusive aims, but rather are all needed to ensure an ideal resolution.

Truth-telling is the cornerstone in shining light on the State of the Church. It is essential for maintaining trust, protecting our congregations, promoting healing, and serving as a positive witness to the world. Part of that truth telling is the need for honest discernment about how we implement the existing Title IV canons in our Church, and encourage all people involved at every level of the Title IV process to do the same. Who is best served by the way our current system is administered? How can we improve it to create a culture of integrity and safety in our Churches while respecting the rights and dignity of every person involved? While these questions are daunting in scope, we must remember Christ's commandment to "tend my sheep" and be reminded that all of us, especially Bishops in the Church, are entrusted with both shepherding and safeguarding the flock of the faithful in our Churches.

A specific area of the Title IV process that we feel needs addressing is the process concerning intake officers. All too often, complaints submitted to the intake officer are "investigated" by well-meaning intake officers—a role outside their Canonical scope. Part of this issue appears to be a deficiency in Title IV training, which we discuss later in this report, and another is likely a very human impulse to want to collect "all the available facts" before making a decision that could result in some sort of adverse action down the line for a member of the clergy. It is vital that Churches provide ample training to all persons involved in Title IV matters, but most especially to Intake Officers who generally serve as the point of first contact for Complainants in these matters.

In addition to greater training and emphasis to Title IV intake officers of the scope of their Canonical role to determine “if the complaint is true, would it constitute an Offense?” as outlined in Canon IV.6.7, there is a greater need for communication and transparency when a determination is made by an intake officer to a Complainant. We have noted that, far too often, a Complainant may not hear about the intake officer’s determination on their Complaint, or if they do, well after a determination has been made. While there is a Canonical requirement of a notice if the complaint is dismissed, there is not clear Canonical mandates requiring a notice that the matter has been referred to a Reference Panel to be sent to the Complainant. Unfortunately, we have observed that often even when the Complaint is dismissed, the Canonical requirement of notification to the Complainant is not made, depriving them of their rights to appeal under the Canons. These areas are in urgent need of addressing.

In discerning how to address these deficiencies, the Committee recommends that the Standing Commission on Structure, Governance, Constitution and Canons consider creating a more uniform Title IV intake process. At present, intake officers throughout the Church have a variety of different levels of training, understanding, and experience with the Title IV process. We ask the Standing Commission on Structure, Governance, Constitution and Canons to discern the wisdom of creating a church-wide intake officer process for all complaints to provide greater uniformity to how these complaints are handled by individuals with expert knowledge of the Title IV process. We also believe such a process would increase faith in the integrity and impartiality of the Title IV process.

We also encourage the Standing Commission on Structure, Governance, Constitution and Canons to consider the use of a third-party specialized organization to oversee the Intake phase of Title IV proceedings. We note that others in the Anglican Communion, such as the Dioceses of Melbourne and Bendigo in the Church of Australia, have adopted the use of a third-party agency known as Kooyoora to provide independent oversight of this process. We also note organizations such as the Godly Response to Abuse in the Christian Environment (GRACE) which is utilized by some Churches in the United States. While we recognize that such a change would have a funding implication for the Church, we believe there is great value in having an independent party examining initial complaints and applying them to our Canons. We encourage the Standing Commission on Structure, Governance, Constitution and Canons to wrestle with this question as it discerns the next best steps for Title IV.

Of great concern in our current Canonical framework is the level of discretion given to the Church Attorney in the Title IV process. The powers defined in Canon IV.2 include “to exercise discretion consistent with this Title and the interests of the Church by declining to advance proceedings or by referring any matter back to the Intake Officer or the Bishop Diocesan for pastoral response in lieu of disciplinary action.” We urge the Standing Commission on Structure, Governance, Constitution and Canons to consider revising the scope of powers granted to the Church Attorney. First and foremost, we are concerned that nothing in the wording of the mandate of the Church Attorney provides any duty to provide advocacy for the Complainant if the Church Attorney’s investigation shows that there is merit to the complaint. As stated in the Canons, the role of the Church Attorney is to represent the Church, not the Complainant, yet significant powers are given to the Church Attorney to make

unilateral decisions on how a complaint is handled, including referring a complaint out of the Title IV process to a pastoral response without any oversight of relevant Title IV bodies or any input by the parties involved.

We recognize that there are many situations in which a pastoral response may be the best outcome for all involved rather than proceeding in the Title IV process. It is paramount, however, that there is greater oversight of the discretion of the Church Attorney, and to ensure that the rights and interests of the Complainant are also being looked after. We urge the Standing Commission on Structure, Governance, Constitution and Canons to provide oversight for the use of discretion by the Church Attorney to refer a matter out of the Title IV process for pastoral response to require the approval of the Reference Panel, or the relevant panel which the matter may currently be pending. We also suggest that the Complainant and Respondent be given notice of this recommendation by the Church Attorney and provide all parties an opportunity to respond with a written submission outlining their position, so that the panel can consider the best actions to take.

We have painfully learned the damage caused when institutions place protecting their own interests over the needs of their members. While we in the Episcopal Church have made great strides to addressing this issue, it is clear that even within our current Canonical framework, our system continues to look after the interests of the Church first and foremost, sometimes to the detriment of our congregations and creating a safe Church. We urge the Church to view a safe Church as in its best interest, and recognize that although justice, accountability, and reconciliation are often painful, it is in the best interests of all involved in the Church and provides for greater public trust in our institutions.

As we outlined above, the Church has representation in the process, but the Complainant has few resources with which to navigate the complicated system of Title IV. While Title IV.19.10 requires advisors to be available to Respondents and Complainants to assist with the Title IV process, we find that this Canon is rarely followed in practice. When it is followed, often any contact with the relevant party is rare. It is vital that everyone in the Title IV process have someone available who can help them navigate this complex process, and who is regularly informed (and therefore can inform) the person they are advising about the current posture of their pending matter.

We also encourage the Church to provide greater pastoral support to all parties involved in a Title IV matter. Too often, both Complainants and Respondents alike are not overtly offered pastoral care. We understand there may be a well-meaning assumption in the Church that if someone is in need of pastoral care, they will contact their priest or some other person in the Church for help, but this is not always the case. We encourage the Church to always make pastoral support available to all involved, and to let the parties know who to contact for this support whenever they may wish it.

We recognize a competing interest in privacy and safeguarding which are aptly represented in the portions of the Title IV Canons requiring a Title IV database but imposing strict privacy requirements. We believe that the current Canonical limitations on the access of this information are far too

stringent, and urge the Standing Commission on Structure, Governance, Constitution and Canons to review the limitations in Canons IV.19.3(i) and IV.19.4 to allow for the database to contain information about the Respondents in cases where there is a sustained finding, either through order or accord, that a Canonical offense occurred. Further, we believe there should be greater accessibility of this information for any institution in the Church that is considering hiring a cleric.

It is important for our Churches to have all relevant information to them when they are discerning hiring a cleric, and it is important that any previous sustained Title IV findings are made available to the relevant authority discerning making this call. We recognize and stress that not every sustained Title IV complaint should be disqualifying for a member of the Clergy, and recognize the importance of forgiveness and reconciliation, but it is vital that bodies that are discerning calling that member of the clergy to a position consider this as part of their discernment process.

As we have noted in our report, a systemic problem of Title IV implementation has been training deficiencies concerning those involved in the Title IV process. We encourage Dioceses and Provinces to place an emphasis on Title IV training for all those involved in all levels of Title IV, including Bishops and Canons to the Ordinary. We also encourage regular Title IV training refreshers to ensure that understanding about the Canonical process remains fresh for all individuals who are handling Title IV issues.

We reiterate this Committee's opinion that the vast majority of issues in how the Title IV process is carried out in the Church is not done nefariously, but rather by well-intentioned people who are trying to navigate a process that is both procedurally and emotionally complex for all involved. Through making greater training resources available to those who may be called upon to fulfill the Title IV process, as well as making pastoral support more freely available to all parties in a Title IV proceeding, we believe we can help mitigate these issues.

We call upon the next Presiding Bishop of the Church to make Title IV a priority as they take over that office, recognizing their central role in the process for Bishops. We encourage our next Presiding Bishop to also join our Church in discerning the best steps for the entire Title IV process. While there has been significant attention about the perceived mishandling of the Title IV process for Bishops, we recognize that these issues are not confined to the handling of such matters for Bishops but are also present in how Title IV is applied to other clerics.

The President of the House of Deputies made increasing safety in the Church one of the key pillars of her Presidency. Having a robust, just, and consistent Title IV process is key to ensuring that our Churches and institutions are safe environments, and that accountability and reconciliation are administered uniformly throughout the Church.

Separate from Title IV, we also call upon the Church to consider fair processes to address lay leaders who may be creating an unsafe Church environment. We note that there are procedures in many other mainline denominations, but there are few, if any, recourse for a member of the Church to rectify an

unsafe situation if the alleged offender is a lay person with authority. We recognize these are difficult conversations and emphasize that these conversations must happen separately from the existing Title IV framework.

We also wish to take a moment to recognize the harm that our Church has caused when it has not handled these matters as well as we might have. We grieve for the negative experiences that many have had with this process, and recognize the pain it has caused, even resulting with many leaving our Church as a result of this experience. We as a Church commit to doing better, and to continue grappling with this difficult issue. While we are, and will always be, an imperfect institution who will not always get things right, we understand—and have a sense that the wider Church understands—the need for these reforms to our process.

While reforms will take many years to be enacted in the Canons, much of what we have noted in our report is covered by our existing Title IV structure but is not consistently being followed or implemented by individuals responsible for various stages of the Title IV process. There is much we can do now, in our existing Canonical framework, to make our Churches safer while we continue to prayerfully discern along with the Standing Commission on Structure, Governance, Constitution and Canons the best ways to improve our Canonical process and ensure that we leave our time in positions of governance in this Church with a safer Church than we found it.

We call upon the 81st and subsequent General Conventions to continue to oversee and discern this work and ensure that the winds for reform move our Church to better and safer shores.

Accessibility and Inclusion

Our mandate from the President of the House of Deputies asks us to consider how the [COVID-19] pandemic accelerated the pace of change across the Church, and through the lens of accessibility, inclusion, and safety. The mandate demands that we ponder, “What questions do we need to be asking ourselves as we move into the future?”

We ask the Church to begin with: “What are we as a Church doing to provide full access, inclusion, affirmation, and reconciliation for disabled and Deaf people at all levels of the Church?”

The COVID-19 pandemic is ongoing. Nearly 1 in every 5 adults in the United States who reported having COVID has experienced symptoms of long COVID well after having COVID itself.ⁱ The prevalence of long COVID is thought to be higher in Latin America and South American countries based on limited research that has been done.ⁱⁱ Nearly 1 in 30 Europeans have experienced long COVID.ⁱⁱⁱ Long COVID, and the chronic health conditions that come with it, has meant that millions of people worldwide have acquired a disability, joining the estimated 1.3 billion people in the world already living with disabilities.^{iv}

Simply put, the COVID-19 pandemic resulted in millions of people worldwide, and thousands in the United States, joining the disability and Deaf communities.

We must also ask the Church: How did the COVID-19 pandemic shine a light on the existing, constant, and now ever-growing need for accessibility and inclusion in our walls, our ministry, and in any place that we gather? What work must we do to ensure that all of God's children can access the table, participate in a Zoom meeting for worship or fellowship, or be affirmed and not simply welcomed?

We call on the Church to begin by remembering our Baptismal Covenant: To strive for justice and peace among all people, and respect the dignity of every human being. We also ask the Church to remember the numerous times it has committed to a voluntary adherence to the Americans with Disabilities Act of 1990, or to act in the spirit of the United Nations Convention on the Rights of Persons with Disabilities of 2006, yet did not do the work necessary to ensure true access and inclusion of disabled people at all levels and in all work of the Church.

The Church's Previous Work Towards Accessibility and Inclusion

Past General Conventions of The Episcopal Church have voted on or passed a total of ten (10) resolutions going back to the 64th General Convention in 1973 in which the Convention committed the Church to accessibility and inclusion of disabled and Deaf people:

- 1973-B113: Prioritize Assistance to and Participation of the Deaf and Deaf Ministry
- 1985-A087: Encourage Opportunities Within the Church for Persons with Disabilities
- 2003-C006: Welcome the Church's Diverse "New Majority"
- 2006-D070: On the Topic of Programs for Persons with Disabilities (Rejected; Resolution died with adjournment.)
- 2009-D032: Commit to Non-Discrimination in Lay Employment
- 2012-D068: Address Education and Pastoral Care of Developmentally Disabled
- 2015-D043: Ensure Accessibility for Disabled Persons at All Church Events
- 2015-D034: Support the Civil Rights of Disabled Persons
- 2015-A077: Publicize Formation Resources for People with Disabilities
- 2018-D097: Establish a Task Force on Accessibility and ADA Compliance

While we commend the Conventions on their desire to affirmatively include disabled people at all levels of the Church and promise to make the Church accessible, many of the resolutions did not result in significant action being taken by any official body of the Church to ensure access and inclusion Church-wide. Those resolutions that led to the creation of Task Forces or other interim bodies were able to gather resources and continue to push and advocate for accessibility and inclusion.

Ultimately, prior to the pandemic, no significant change in policy or structure of the Church led to actual or measurable accessibility and inclusion for disabled people. The resources that were gathered,

while done with every best intention, were not made so widely available as to be both instructive at all levels of the Church for full inclusion and accessibility and, more importantly, easily accessed by all Church institutions and congregations.

By the time all ten resolutions had passed, there were numerous laws in the United States, the United Nations, and across Asia and Europe that guaranteed access and inclusion in all aspects of society. Indeed, multiple and renowned disability rights organizations with abundant information and resources, such as DREDF in Berkeley or the ADA National Network, have been available to any member of the public and any organization that desired concrete information and steps to take towards accessibility and inclusion of disabled and Deaf people in their spaces.

Task Force on Disability and Deaf Access

There is one very significant interim body resulting from a General Convention resolution that we wish to highlight in this Report. In July 2018 at the 79th General Convention, 2018-D097, “Establish a Task Force on Disability and ADA Compliance,” was passed as a result of organized efforts by disability advocates on the floor, their allies, and several deputy caucuses representing multiple marginalized communities in the Church. The mandate of the task force, officially titled the Task Force on Disability and Deaf Access, was “to review progress made toward full compliance with the Americans with Disabilities Act (ADA) and any other relevant statutes; consult with Church staff to ensure that materials, policies, and procedures for accessibility and reasonable accommodations are developed and implemented for each General Convention and ancillary Church events; and develop a means of reconciliation with people who have been excluded from Church events due to lack of accessibility or failure to provide reasonable accommodations.”

While the work of the Task Force was greatly impacted by the COVID-19 pandemic, its Blue Book Report to the 80th General Convention provides an excellent foundation for the work of access, inclusion, and affirmation of disabled and Deaf people to be done by the Church going forward. Because they did an excellent job of laying out the concerns we share regarding accessibility and inclusion in the Church today, we feel no need to repeat much of their report. We deliberately include the link to the Task Force’s Blue Book Report to the 80th General Convention here for all to read and prayerfully consider: https://www.episcopalarchives.org/e-archives/gc_reports/reports/2022/bb_2022-R038.pdf

We wish to strongly highlight the fact that the Task Force’s Report was written by disabled and Deaf members of the Task Force, as experts on the areas of access and inclusion, and able to share with the Church their expertise in the language, cultures, identities, and lived experience as disabled Children of God. This makes their Report recommendations even more urgent:

- **Formation and Ordination:** “Accessible alternatives in formation at all levels, with specific attention to formation for ordination.”

- **Language Access:** “Specific communication access requests for persons who are Deaf or hard of hearing should always be provided as a reasonable accommodation for full participation in meetings and activities of The Episcopal Church, whether the request is for American Sign Language interpretation or Communication Access Realtime Translation (CART) services”.
- **Liturgy:** “We encourage official revisions of the Book of Common Prayer, and all liturgies written for use in the Church, to use language that acknowledges the personhood of Deaf/deaf and hard of hearing people and people with disabilities, rather than categorizing by afflictions, conditions, and other general descriptors, such as referring to “the homeless.” ... [W]e strongly recommend consulting with Deaf and disability communities when revising liturgical language. All references that use terminology of disabilities or deaf as metaphors for sins or failings should be revised.”
- **Funding:** “Creating justice in the present and future Church requires appropriate allocation of funds, which should be considered by leadership bodies at all levels.”
- **Recognition (and Deliberate Inclusion) of the Episcopal Conference of the Deaf as an Interim Body:** “A continued place for the work of ... Deaf/deaf and hard of hearing people in church-wide structures, rather than representation requiring legislation of General Convention every triennium.”
- **Disability Advisory Group:** “We recommend formation of an on-going Disability Advisory Group, to:
 - Offer support for individuals with disabilities
 - Collaborate with the Episcopal Conference of the Deaf
 - Collaborate with disability organizations of other denominations
 - Curate resources and make such resources available online
 - Consult and offer support for congregations, dioceses, and other church institutions and leadership bodies
 - Support advocacy and education”

We asked above, “What questions do we need to be asking ourselves as we move into the future?” Another question might be, “Why haven’t we become a Church that is truly accessible, inclusive, and safe for disabled and Deaf people, despite our long-standing commitment to these values and our Baptismal Covenant of recognizing the dignity of every human being?”

Concrete Actions for Making the Church Fully Accessible, Inclusive, and Affirming

We recognize that many of the Task Force’s recommendations are not possible without the adequate resources and ongoing bodies to support full access and inclusion across the Church and at all levels of the Church. We also recognize that resources have been created, and exist in the Church for immediate Church use.

The Diocese of California created its own Task Force on Disability and Deaf Access at its 170th Diocesan Convention in 2019. That Task Force has developed both a Best Practices Guide for accommodating and including disabled and Deaf people at all levels of the Church, including voluntarily so at the parish level. The Best Practices Guide was completed during the COVID-19 pandemic so as to include recommendations relevant to pandemic life and post-pandemic life where video conference platforms are far more frequently used. The Task Force also created a disability sensitivity and awareness training that the Diocese has required all diocesan staff, both lay and clergy, with hiring responsibilities and the Commission on Ministry to take every three years. The Diocese mandated disability sensitivity training at its 173rd Diocesan Convention in 2022.

Even more, we commend the DioCal Task Force for beginning discussion and collaboration with the Church of England's Disability Advisor for the Diocese of Oxford^v, and efforts to begin collaborating across the Anglican Communion on the topic of accessibility and inclusion in our worship, ministry, governance activities, and all other activities of the Church. We recognize that the Anglican Church of Aotearoa, New Zealand and Polynesia also has two disability ministry educators who address the work of accessibility and, especially, inclusion of disabled people.^{vi} The Anglican Church also has a best practices guide for accommodating disabled people in its spaces and work.^{vii}

That at least two of our sibling churches in the Anglican Communion have created official posts dedicated to the work of disability accessibility and inclusion in the Church means we must, as a church that originated in the same country as the largest disability rights movement, also take up such roles and leadership Church-wide.

We call on the Diocese of California to share these resources with the greater Church, especially as we ask the 81st General Convention to pass legislation making the disability sensitivity and awareness training and Best Practices Guide available for all members of the Church. In doing so, The Episcopal Church will be that much closer to the work of the two above-named sibling churches in the Anglican Communion.

At the same time, we note the urgency to create an official body to take on the role of a disability advisory group that the Church's Task Force on Disability and Deaf Access recommended above, and also move towards establishing official roles of a disability officer within The Episcopal Church. This official body, whether created as a subcommittee of the Executive Council or as a body established by the 81st General Convention, should have the resources available to provide oversight, guidance, and to be a resource for the entire Church.

Future Work

As a committee, we have had many discussions about the present and future State of the Church. Often in our discussions, we would realize that what we wished we could accomplish during this pandemic-shortened “biennium” was impossible. With guidance from President Ayala Harris, we focused on what was both achievable and attainable in the shortened time frame. As noted in the subcommittee reports, we have posed many questions that we hope the church will ask itself in the future. It is our hope that perhaps those questions guide the work of future State of the Church committees. We hope that increased data collection and transparency about that data will provide a more accurate picture of the state of the church and that, one day, a dedicated staff officer for data will be in place. Perhaps someday in the future, there might be a denomination-wide survey, much like the United States census, to obtain data from individuals and parishes that is not gathered elsewhere. Additionally, while we are all aware that historically The Episcopal Church is largely white, we know that it is changing. Our committee membership reflected that shift. Most of our membership was under 40 years old. We represented many ethnic groups, including many who identify as members of multiple ethnic groups. We had representation that spanned the gender and sexual orientation spectrums. We had people who spoke different native languages. We had members who are neurodivergent and/or disabled in some way. We as a committee feel that it is important that in the future, there are efforts to reach those Episcopalians who are not heard from as often. We would like to see increased communication between caucuses and groups such as the Deputies of Color, LGBTQ caucus, GC under 40 caucus, and the whole church. We will not know the true state of the church until all voices are included.

End Notes

ⁱ https://www.cdc.gov/nchs/pressroom/nchs_press_releases/2022/20220622.htm

ⁱⁱ <https://www.frontiersin.org/articles/10.3389/fmed.2023.1168628/full>

ⁱⁱⁱ <https://www.who.int/europe/news/item/27-06-2023-statement---36-million-people-across-the-european-region-may-have-developed-long-covid-over-the-first-3-years-of-the-pandemic>

^{iv} <https://www.who.int/news-room/fact-sheets/detail/disability-and-health#:~:text=Key%20facts,1%20in%206%20of%20us.>

^v <https://www.oxford.anglican.org/environment-and-social-justice/deafness-disability/>

^{vi} https://www.anglicantaonga.org.nz/news/common_life/dismineds

^{vii} https://www.anglicantaonga.org.nz/news/common_life/making_churches_more_accessible

Proposed Resolutions

A050 Publishing and Sharing Resources for Disability Access and Inclusion

Resolved, That The Episcopal Church recognize that all people are children of God and that our Baptismal Covenant requires us to recognize the dignity of every human being; and be it further

Resolved, That disabled and Deaf people have been historically and systemically excluded from Church life and business throughout Church history; and be it further

Resolved, That the Church has committed itself to voluntary compliance with the Americans with Disabilities Act through creation of a Task Force on Disability and Deaf Access in 2018; and be it further

Resolved, That the 81st General Convention direct the Episcopal Church Center to publicize, through the Episcopal Church website and by other appropriate means, to dioceses, congregations, and Christian Formation leaders, a Best Practices Guide for voluntary means of creating an accessible Church and a disability sensitivity and awareness training for all to use as resources in furtherance of an accessible Church.

EXPLANATION

The Church, over several decades, has promised to be accessible for disabled and Deaf people at all levels of the Church, and to commit to voluntary compliance with accessibility laws, notably the Americans with Disabilities Act (and, for diocese outside of the United States, the United Nations Convention on the Rights of Persons with Disabilities).

In 2018, the 79th General Convention created a Task Force on Disability and Deaf Access to assess disability and Deaf accessibility throughout the Church. The Task Force's Blue Book Report made several suggestions for becoming an accessible Church, but did not publish or make available resources for the wider Church to use in taking this significant step forward.^[1]

The Diocese of California created its own Task Force on Disability and Deaf Access at its 170th Diocesan Convention in 2019. That Task Force has developed both a Best Practices Guide for the voluntary, low-cost, and easy means of access and inclusion for disabled and Deaf people at all levels of the Church, including at the parish level. The Best Practices Guide was completed during the COVID-19 pandemic so as to include recommendations relevant to pandemic life and post-pandemic life where video conference platforms are more frequently used. The Task Force also created a disability sensitivity and awareness training that the Diocese has required all diocesan staff, both lay and clergy, with hiring responsibilities and the Commission on Ministry to take every three years. The Diocese mandated this disability sensitivity training at its 173rd Diocesan Convention in 2022.

The DioCal Guide and Training were developed by two members of the Disability Community, each of whom has not only lived experience with disability but also professional experience working for and with nationally-renowned disability rights organizations such as Disability Rights Education and

Defense Fund, Inc. and the National Association of the Deaf. These resources were developed specifically for use within a faith community and especially in The Episcopal Church. These resources were also inspired by existing resources in the Church of England's own disability resources, including the Disability Officer for the Diocese of Oxford.^[i]

The current House of Deputies Committee on the State of the Church includes multiple members who identify as disabled and/or as neurodiverse. The Committee thus recognizes the importance of making these resources widely available to the Church at large, particularly once the DioCal resources have been appropriately vetted, and urges this Convention to pass this resolution so that concrete steps towards Church-wide accessibility, as each Church institution and parish or congregation is able, can be made available throughout The Episcopal Church.

[i] https://www.episcopalarchives.org/e-archives/gc_reports/reports/2022/bb_2022-R038.pdf

[ii] <https://www.oxford.anglican.org/environment-and-social-justice/deafness-disability/>

A051 Amend Canons I.2.4.a Data Collection for the Church (co-sponsored with House of Deputies Committee on the State of the Church)

Resolved, That the 81st General Convention amend Canon I.2.4.a to add item a.7 as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

7. Make provision for the analysis of appropriate data about this Church's mission, its opportunities, and challenges. An annual report, published freely to the Church, will include such data as to allow for data-informed decisions by the Domestic and Foreign Missionary Society, the General Convention, the Executive Council, dioceses, congregations, and local leaders.

<Proposed amended resolution text showing exact changes being made:>

7. Make provision for the analysis of appropriate data about this Church's mission, its opportunities, and challenges. An annual report, published freely to the Church, will include such data as to allow for data-informed decisions by the Domestic and Foreign Missionary Society, the General Convention, the Executive Council, dioceses, congregations, and local leaders.

And be it further

Resolved, That all dioceses, congregations, and other church institutions are urged to cooperate with all research endeavors sponsored by the Domestic and Foreign Missionary Society by responding to requests for data; and be it further

Resolved, That the General Convention will provide a budget allocation of \$75,000 to carry out this work in the first triennium.

EXPLANATION

This resolution was co-sponsored by the House of Deputies Committee on the State of the Church and the Standing Commission on Structure, Governance, Constitution and Canons.

When is the best time to plant a tree?

Twenty years ago.

When is the second-best time to plant a tree?

Now.

The Episcopal Church is woefully behind our sister denominations in the collection, study, and use of data for decision making at every level of the Church, and in a perfect world, this resolution would be designed to create a high level staff position for such work. Given the realities of a new Presiding Bishop who will want to organize their own staff, this stop-gap measure is presented to a) require the next Presiding Bishop to offer a full data analysis and b) urge the Church-wide structure, dioceses, congregations, committees, commissions, agencies, and boards to make use of data in their decision making. Outsourcing this work in the first triennium will allow the Presiding Bishop, the House of Deputies Committee on the State of the Church, and the Standing Commission on Structure, Governance, Constitutions, and Canons to take an iterative approach in understanding what data is helpful, how it is best collected, and in what form the report should be produced.

Supplemental Materials

Approved New Parochial Report

Proposed New Parochial Report

Approved by State of the Church Aug. 2023

Direct questions to Evangeline Warren (Chair, Data Subcommittee)

1. We will first walk through the membership of your church. (numeric responses)

This question helps us measure the scope and reach of our churches, acknowledging that not every participant or person touched by the church is a member. In addition, our hope is that this question captures long distance (virtual) engagement as well. To calculate “viewership” for online or streamed services please use the combined totals across all streaming platforms (e.g., 5 Zoom viewers, 10 Facebook viewers, 25 YouTube viewers would be 40 total live viewers). Viewership should measure “unique” viewers (rather than using viewers as a proxy for household) and includes all viewers, no matter for how long they stayed.

Communicants in Good Standing must meet the following requirements as stipulated in Canon 1.17c. In the previous year, ones who have received Communion three times, and have been faithful in corporate worship, unless for good cause prevented, and have been faithful in working, praying, and giving for the spread of the Kingdom of God.

Active members (others) should include those who regularly participate in the life of the church, are members (according to your parish standard) but do not meet the Communicant in Good Standing threshold. This can include non-Episcopalians and non-Christians who are members of the parish.

Active participants (non-members) should include those who participate in the life of the church but do not meet the Communicant in Good Standing threshold OR the membership standard for your parish.

Average Sunday Attendance (on site)

Average live (unique) viewership of streamed or online Sunday service

Average 1 week (unique) viewership of streamed services

Average Weekday attendance (on site)

Average Weekday attendance (online)

Estimated beneficiaries of outreach ministries

Average number of non-member volunteers for outreach ministries

Total average impact of church (above, summed)

Total Communicants in Good Standing

Communicants in Good Standing Under 16

- Active members (other)
- Estimated Active Participants (non-members)

- Easter attendance (total across all offered services)
- Christmas attendance (total across all offered services)

2. We will now walk through the regular staffing of your church. (numeric responses)

This question helps us understand how many individuals undertake work on behalf of the church, recognizing in particular the contributions of lay staff (paid or unpaid). Unpaid lay staff may include, but is not limited to, nursery workers, Sunday school facilitators, parish administrators, lay preachers, etc.

- Full Time Clergy
 - Part Time Clergy
 - Non-Stipendiary Clergy

 - Full Time Lay Staff
 - Part Time Lay Staff
 - Unpaid or Non-Stipendiary Lay Staff

 - Total Priests
 - Total Deacons
- Total Clergy Staff

 Total Lay Staff
 Total Staff

3. Who leads your primary worship service? (select one)

- Full Time Priest
- Part Time Priest
- Short Term Supply
- Long Term Supply
- Lay Person
- Deacon

4. Does your congregation have a unique or unusual clergy situation? (select all that apply)

- Long Term Supply or Interim
- Call to Common Ministry
- Clergy from elsewhere in The Anglican Communion

**5. How many of the following services did your church provide?
(numeric responses)**

This information should be easily accessed through your parish register. This helps us measure the vitality of our church through the provision of sacraments and other lifecycle services.

- Marriages
- Baptisms
- Confirmations
- Burials
- Eucharists
- Daily Office Services

6. Which of the following services/programs/initiatives does your church have? (select all that apply).

This question allows us to measure the vitality of the church through provision of services and initiatives that help engage the parish and larger community.

- Sunday Morning Eucharist
- Sunday Morning Prayer
- Other Weekend Eucharist
- Weekday Eucharist
- Weekday Morning/Noonday/Evening Prayer
- Streamed Service
- Interactive Virtual Service
- Paid Musicians
- Volunteer Musicians
- Adult Choir
- Children's Choir
- Sunday School
- Sunday Childcare
- Bible Study
- Outreach Ministries (e.g. food pantry, shelter)
- Ecumenical Collaboration
- Virtual Formation
- In Person Formation
- Campus Ministry
- Other: _____

**7. Does your church have any subsidiary or associated organizations?
(select all that apply).**

- Preschool or Nursery Program
- K-8 School
- 9-12 School
- Outreach Ministry
- Other: _____

8. For which of the following languages do you offer services? (select all that apply)

This question allows us to better understand the distribution of languages of worship within the church. It also helps us highlight parishes which multilingual programs and services.

- English
- Spanish
- French
- Haitian Creole
- Mandarin
- Tagalog
- ASL
- Other: _____

Select this box if you offer a service that is simultaneously conducted in more than one language.

9. Approximately what percentage of your congregation is White, Caucasian, or of European descent?

<slider from 0-100>

10. What is the estimated average age of your congregation?

<slider from 0-100>

11. What is your normal operating income?

This question helps us understand the role of finances in shaping the work your church does.

[Numeric response]

12. Now let's walk through your financial assets. (numeric responses)

Similarly, this question helps us understand the structure of your financial assets.

[___] Endowment (restricted)

[___] Endowment (unrestricted)

[___] Total Endowment

[___] Non-endowed Assets (restricted)

[___] Non-endowed Assets(unrestricted)

[___] Total Non-endowed Assets

[___] Total Assets

13. How is your parish reducing your carbon footprint?

The inclusion of this question is mandated by Resolution 2022-D064. This question is optional.

[text response]

14. What is one program or initiative at your Church that you feel best exemplifies your congregation?

This short answer question helps us recognize the church at work every day. This question is optional.

[text response]

15. What is one program or initiative at your Church that represents your hope for the future of your congregation or the greater Episcopal Church?

This short answer questions helps us celebrate your accomplishments and goals. This question is optional.

[text response]

If you have questions or comments about this parochial report, please contact the House of Deputies State of the Church Committee.

PRESIDENT OF THE HOUSE OF DEPUTIES COUNCIL OF ADVICE

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Changes in Membership

Ms. Jane Cislucyis resigned from the Council of Advice for the President of the House of Deputies in 2022.

Committee Composition

The Council of Advice reflects diverse and broad membership from across the church. Members of the Council of Advice were asked to serve based on their critical roles and unique perspectives.

Meetings

The Council of Advice held three in-person meetings. The first in Alexandria, Virginia, on November 11-12, 2022. The second in Irvine, California, on March 3-4, 2023. The third in Louisville, Kentucky, on September 15-16, 2023. The Council of Advice also held two virtual meetings via Zoom, one on December 14, 2022 and the other on August 9, 2023

Mandate

CANON I.1.1 (b) states "The President shall be authorized to appoint an Advisory Council for consultation and advice in the performance of the duties of the office."

Summary of Work

The President of the House of Deputies Council of Advice discussed implementation of the President's priority themes of safety, inclusivity, and accessibility, including the possibility of a Community Covenant at the 81st General Convention. The Council also planned House of Deputies aids for the work of the 81st General Convention; specifically, videos to help with the creation of Blue Book Reports and a how-to on writing resolutions. Furthermore, the President formed subcommittees within the Council to assist with populating Legislative Committees.

ARCHIVES ADVISORY COMMITTEE

Members

Prof. Lawrence R. Hitt II, Chair	Colorado, VI	2024
Mr. Kent Anker, Chief Legal Officer	New York, II	2024
The Rev. Canon Dr. Michael Barlowe	California, VIII	2024
The Rt. Rev. Jennifer Baskerville-Burrows	Indianapolis, V	2024
Dr. Heather Calloway	Indianapolis, V	2024
Canon Jane Cislucyis, Acting Chief Operating Officer	Indianapolis, V	2024
Dr. Victor A. Feliberty-Ruberté	Michigan, V	2027
Ms. Whitney Hughes, Interim Director	Puerto Rico, II	2024
The Rev. W. Keith McCoy	New Jersey, II	2024
Ms. Margaret Porter, Vice-Chair	New Hampshire, I	2024
Mr. Russell Randle, Secretary	Virginia, III	2027
The Rt. Rev. Samuel Rodman	North Carolina, IV	2027
The Rt. Rev. Martha E. Stebbins	Montana, VI	2027
The Rev. Canon Dr. Gregory Straub	Easton, III	2027
The Rev. Rachel Taber-Hamilton	Olympia, VIII	2027

Changes in Membership

There were no changes in membership during the past triennium except for the appointment to the Committee of Canon Jane Cislucyis, Acting Chief Operating Officer, by the Chair of the Executive Council.

Representation at General Convention

Multiple members of the 2019-2022 Board of Archives were present at the 2022 General Convention in Baltimore, Maryland, and current Committee members will attend the 2024 General Convention in Louisville, Kentucky, as either deputies, alternate deputies, or members of the House of Bishops .

Acknowledgements

The Rev. Canon Michael Barlowe; Chief Legal Officer Kent Anker; Acting Chief Operating Officer Canon. Jane Cislucyis

Mandate

2022 - A154 Revised Canon I.5 Regarding The Archives of The Episcopal Church

Canon 5: Of the Archives of The Episcopal Church

Sec. 1. There shall be an Archives of The Episcopal Church, the purpose of which shall be to preserve by safekeeping, to arrange and to make available the records of the General Convention, Executive Council, and the Domestic and Foreign Missionary Society, and other important records and memorabilia of the life and work of the Church, and to carry out a program of records management, so as to further the historical dimension of the mission of the Church.

Sec. 2. For purposes of this Canon, records are defined as all fixed evidential information regardless of method, media, format or characteristics of the recording process, which have been created, received or gathered by the Church, its officers, agents or employees in pursuance of the legal, business and administrative function and the programmatic mission of the Church. Records include all original materials used to capture information, notwithstanding the place or conditions of creation, or the formality or informality of the characteristics of the record. The records and archives of the Church are not limited by the medium in which they are kept and include such formats as paper records, electronic records, printed records and publications, photo-reproduced images, and machine-readable tapes, film and disks.

Sec. 3. The Archives of The Episcopal Church shall be managed by the Archivist.

Sec. 4. After consultation with the Archives Advisory Committee, the Presiding Bishop and the President of the House of Deputies in their respective roles as the Chair and Vice-Chair of the Executive Council, shall jointly nominate and the Executive Council shall appoint the Archivist who shall serve at the pleasure of, and report and be accountable to the Chair of the Executive Council. If a vacancy should occur in that office, a successor shall be appointed in like manner.

Sec. 5.

a. There shall be an Archives Advisory Committee which shall consist of the Archivist, the Registrar, the Chief Legal Officer, the Historiographer, and between eight and twelve appointed persons, two or three of whom shall be Bishops, two or three of whom shall be Clergy, and four, five or six of whom shall be Lay Persons. All appointed Members of the Advisory Committee shall serve terms beginning upon the adjournment of the General Convention at which their appointments are confirmed and ending with the close of the second regular Convention thereafter.

b. Bishops shall be appointed by the Presiding Bishop, and other Clerical and all Lay Members shall be appointed by the President of the House of Deputies; after the initial appointments, all subsequent appointments shall be subject to the confirmation of General Convention. Consideration

shall be given to assure that membership includes persons who possess knowledge either of history or archival administration, or are persons skilled in disciplines pertinent to the resolutions of the concerns of the Archives. Positions of Members of the Committee which become vacant prior to the normal expiration of such Members' terms shall be filled by appointment by the Presiding Bishop or by the President of the House of Deputies, as appropriate. Such appointments shall be for the remaining unexpired portion of such Members' terms, and if a regular meeting of the General Convention intervenes, appointments for terms extending beyond such meeting shall be subject to confirmation of the General Convention. Because of the special skills and knowledge needed by this Committee, a Member shall be eligible for appointment for two successive terms, after which the Member may not be reappointed prior to the next meeting of the General Convention following the meeting at the close of which the second successive term of the Member expired. Members appointed to fill vacancies in unexpired terms shall not thereby be disqualified from appointment to two full terms immediately thereafter.

c. The Archives Advisory Committee shall provide advice regarding identification, collection, preservation, management, use, and accessibility of records, and establishment of best practices regarding the same to the Archivist, the Archives, and the Executive Council.

d. The Archives Advisory Committee shall meet at least annually, or as requested by the Archivist or the Chair and Vice-Chair of the Executive Council.

Summary of Work

Introduction / History / Organization of AAC

The 80th General Convention revised Canon I.5 to replace the Board of the Archives of The Episcopal Church with the Archives Advisory Committee (“AAC”). The AAC members were appointed in early 2023 by the Chair and Vice-Chair of Executive Council, who also appointed Lawrence R. Hitt II, longtime Chancellor of the Diocese of Colorado, as Chair; he and four other members previously served on the Board of Archives. His level of service to the Archives and the Church provides outstanding gifts and skills which will be immensely valuable to the upcoming work of the AAC and the Archives. The *ex officio* members include the Archivist, the Registrar, the Chief Legal Officer, and the Historiographer.

The first year of this new committee began with organizational zoom meetings and the creation of an initial Organizing Subcommittee (which evolved into a Steering Committee), that quickly focused on significant matters within the purview of the AAC as established by the Canons. The members are to be commended not only for quickly organizing and identifying their work as a new interim body of the Church, but for articulating new Vision, Purpose, and Mission Statements.

The Steering Committee was especially helpful with respect to setting priorities for the AAC’s attention. Special thanks to Russell Randle, Keith McCoy, Margaret Porter, Kent Anker, and Larry Hitt for serving on this group.

The Steering Committee also took the first steps in evaluating the current needs of the Archives and its staff, and in addressing and clarifying the role of the AAC with respect to two top priorities: 1) identifying a permanent home for the Archives, and 2) hiring the next Canonical Archivist. The Steering Committee initiated a conversation with the Chair and Vice-Chair of Executive Council regarding how the AAC could play a meaningful role in both priorities, as we understood the intent and responsibilities of the AAC as set forth in the revised Canon.

The AAC met in May and August via Zoom and in person over two days in Baltimore in October. The committee is very grateful not only for the preparation and leadership of the Steering Committee, but also for the willingness of Margaret Porter to serve as Vice Chair and Russell Randle to serve as Secretary.

In addition to the organizational and visioning work, the AAC has asked Whitney Hughes, the Interim Director, and the Archives staff to identify the more significant parts of their work for an intentional review by the AAC-- as called for in the Canon – and we anticipate that a small group of committee members will be meeting with the staff in Austin to further this important piece of our canonical duty.

The Archives of the Episcopal Church and its Contributions to the Church

Established by General Convention in 1835, the Archives of the Episcopal Church houses and maintains the records of the Domestic and Foreign Missionary Society, the General Convention and its interim bodies, Episcopal Organizations, and the papers of lay and clerical leaders of the Church. In addition to its historic holdings and operations in Austin, the Archives' New York repository acts as The Episcopal Church's contemporary records center.

The Archives' Research Office provides their services to Church leadership, governing bodies, and scholars. The Archives staff consults with dioceses and parishes around records and archives management issues including the retention, preservation, and access of paper and electronic records.

Within the DFMS, the Archives staff work with leadership and staff to establish and support information governance and records retention best practices. They work with Church attorneys on matters of Title IV, property litigation, and interpretation and application of the canons.

At General Convention, the staff provide onsite support to the Secretariat and act as the corporate memory of the Church. Each proposed resolution is researched to determine if the topic has been addressed previously by the Church and what, if any, action was taken. This is done through supplying research reports to legislative committees prior to and during their deliberative gatherings. They further support the Presiding Officers, Parliamentarians, and legislative committees with historic research onsite.

As a keeper of the institutional memory of The Episcopal Church, the Archives provides for the continuity of business in a revolving and evolving cycle of Church leadership, thus providing a reliable conduit to the past that lifts up the current mission and ministry and informs the future vision of the Church.

Development and Articulation of Mission Statements

The AAC, at its Baltimore meeting, spent a half day identifying and articulating its purpose and vision, and considering the duties and responsibilities set forth in the *revised* Canon. Keith McCoy and Dr. Victor A. Feliberty-Ruberté facilitated the discussion, which resulted in the following Purpose, Mission, and Vision Statements.

Purpose: The Archives Advisory Committee advises the Archivist, the Archives, and the Executive Council of The Episcopal Church in preserving the rich tapestry of our faith's history, safeguarding the memory and legacy of our saints, and ensuring that the truth of the Gospel and our traditions are faithfully recorded for future generations .

Mission: Our mission is to advocate for the Archives and to share best practices as it acquires, curates, protects, and makes accessible records that honor our sacred past, enabling the

Archives to provide resources which educate, advise, and equip Episcopal communities for their profound journey of faith.

Vision: Our vision is to enable the Archives to achieve the highest standards of integrity, professional record-keeping, and responsiveness, ensuring the accuracy of the institutional memory of The Episcopal Church, and that the history of our faith remains alive, accessible, and central to our identity and mission .

The Role of the AAC in Hiring a Canonical Archivist

Under the revised canon adopted in 2022, the Archives Advisory Committee, in cooperation with the Executive Council, the Chief Legal Officer, the Historiographer, the Registrar, and the Archives staff, expects to take the lead in preparing the job description for the Canonical Archivist and Director of the Archives. The Advisory Committee is prepared to assist in publicizing the position among professional archivists, to assist in screening candidate resumes, to prepare questions for use in interviews with qualified candidates, and to assist in interviews with final candidates and to offer feedback about the strength of their qualifications. The Advisory Committee will make special effort to welcome and assist the new Archivist in making a successful start in that position and will provide background and history to assist in that person's success.

The Work of the Interim Archivist and the staff of The Archives of the Episcopal Church

The Archives Advisory Committee wholeheartedly and gratefully commends the entire staff of The Archives of the Episcopal Church for their ability to carry out their responsibilities in a persistent climate of disruption and uncertainty. In 2021, while much of The Episcopal Church was still working remotely due to the Pandemic, the Archives relocated the historic collection and operations from the campus of the Seminary of the Southwest to an interim location in Austin, without noticeable interruption of service to the Church .

In March 2022, Canonical Archivist Mark Duffy retired after thirty years of service .

Routine essential tasks that continue to be admirably performed include: responding to research requests, assisting visiting researchers, maintaining the Archives' website and Digital Archives, supporting Title IV, litigation, and other in-house legal requests, supporting the work of Interim Bodies around General Convention resolutions, and acquiring and preserving records in a variety of formats. The staff steadfastly engage in this monumental work at a time when the Church continues to discern the future location of a permanent Archives.

At the 80th General Convention the Archives staff provided support remotely with the usual preparation and intensive research services necessitated by that event. The Archives staff will return to onsite support at the 81st General Convention in Louisville, Kentucky.

The leadership of Whitney Hughes, Interim Director, and David Hales, Deputy for Administration, ensures that our Archives staff maintain this exemplary service. The Episcopal Church, as well as the Archives Advisory Committee, are the beneficiaries of their achievements.

Critical Need for a Permanent Home for the Archives

The Archives Advisory Committee cannot emphasize enough the compelling and critical need for The Episcopal Church to establish a permanent home for the Archives as soon as possible.

As noted in the attached report from the Archives Interim Director the current location in an industrial warehouse building in Austin “does not meet the Archives’ needs” and is not capable of holding the entire collection, which is currently housed among 4 locations. The acquisition of materials is always conducted with an eye towards available space and resources; as once a donation is accepted, the Archivist has a professional duty to uphold the trust placed in us to provide for the permanent housing, preservation, safekeeping, and access to the materials. For the first time, the Archives was unsuccessful in a significant acquisition opportunity due to its uncertain future and physical space. It continues to be of the utmost importance that The Episcopal Church find a permanent home for the Archives that will allow it to fulfill its mission and continue to connect the Church’s history with its ongoing ministries.”

Not only is a permanent home essential for the Archives to continue its extensive work for the General Convention and the Church’s ministries, the cost of the temporary facility in Austin will soon be prohibitively expensive. The Archives Advisory Committee strongly urges, as a matter of the highest priority, the Church to commit to building an appropriate permanent home for the Archives .

THE ARCHIVES OF THE EPISCOPAL CHURCH

Triennial Report of the Archives Interim Director

Summary of Work

The 2021-2023 triennium was a period of transition for the Archives. In 2021, while much of the Church was still working remotely due to the COVID-19 Pandemic, the Archives moved from its long-term home at the Seminary of the Southwest in Austin, Texas to a new, albeit temporary, location at 107 Denson Drive, Austin, Texas. In 2022, the Canonical Archivist and Director, Mark Duffy, retired following a 30-year career defined by his unwavering leadership of and vision for The Archives of the Episcopal Church. The Archives saw the departure of three full-time curators and multiple part-time staff; with the retirement of Records Manager Corrinne Collett being felt particularly strongly.

Despite these difficult circumstances, the Archives staff has risen to the occasion. In November 2021, Amy Evenson assumed the role of Archivist for Institutional Research and Public Services. Having joined the Archives staff in a part-time role to assist with the move, Amy quickly established her value. Armed with a Masters in History and a background in communications and marketing, Amy has been shepherding an unprecedented amount of legal research with professionalism, accuracy, and efficiency.

In January 2022, Sarah Sauri shifted seamlessly into the role of Collections Manager, having previously been the Archivist Assistant to that role for 6 years. Sarah's familiarity with the Archives' procedures, documentation, and collections allowed her to immediately jump into the fray, completing an in-depth audit of the entire Archives' holdings, overseeing the migration of approximately 1,200 cubic feet from offsite storage, as well as overseeing the creation of a public-facing catalog.

In June of 2023, after an extensive search, Carlinthia Cox was hired to fill the long vacant Records Management position. Carlinthia's prior experience in a religious not-for-profit archives program along with her professional archives network has helped to bring a fresh perspective to the Records Management department.

Archivist Retirement

In January of 2022 came the announcement of Mark Duffy's retirement effective March 31, 2022 after almost 30 years as Canonical Archivist and Director. During the first quarter of the year, Mark worked with the Archives staff to close out a number of projects and to prioritize future work of the Archives. Members of the Executive Committee of the Board of Archives, along with former Board Chair, Bishop Neil Alexander, were on hand on Mark's final day, to thank him and honor his service. The Board

unanimously agreed to name the Archives Reading Room in Mark's honor and to bestow upon him the title of Archivist Emeritus.

The administrative responsibilities of the Canonical Archivist and Director were taken up by the Administrative Deputy, David E. Hales. The staff and archival management was transferred to the Digital Archivist, Whitney Hughes.

Interim Director

By mid-2022 a candidate for the position of Interim Director had been identified and vetted. Unfortunately, that candidate removed themselves from the process citing personal reasons. The filling of that position was not actively pursued until it was suggested in late summer that Whitney Hughes, incumbent Digital Archivist, should be asked to submit her resume. Whitney assumed the role of Interim Director on November 1, 2022 coupled with her continuing duties as Digital Archivist.

Research Services

The Research Services of the Archives continues to be in high demand, as archivists responded to 1,302 research queries from 2021-2023. The Records Management Office responded to 24 research inquiries from Episcopal Church Center staff for requests involving contemporary records. Consultations to dioceses, parishes and other church agencies on archiving, records retention, digital archives and related matters accounted for 114 requests. Overall, the Archives staff responded to 1,440 requests for information and assistance during the three years from 2021-2023.

While the number of requests are lower than previous triennia, the decrease is predictable for a variety of reasons. The limited access to the Archives' holdings due to the pandemic and the closure of the Archives Research Office in Austin from April to September of 2021 for the Archives move greatly diminished the total number of requests. The inclusion of new resources on the Archives' website, such as the *Clerical Directories*, *The Spirit of Missions*, and the *Witness*, resulted in an increased usage of the Archives online offerings without interaction with staff. Additionally, the unusual 2022 General Convention resulted in delayed appointments to interim bodies, which has limited the number of internal requests from church bodies. The continued remote work of ECC staff, coupled with the retirement of our long-term Records Manager in 2021, resulted in low requests through that office, with most of the serviced requests being deemed essential to the continuity of business of the DFMS. The departure of Mark Duffy, a prevalent voice in the archives community, also likely affected the number of consultations requested.

Institutional Research

Institutional research covers any request from the DFMS; including the General Convention, Executive Council, and interim bodies; official Episcopal Church agencies, and dioceses and parishes. These users have been in decline in recent years, peaking in 2020 at 38% before dropping to 20% in 2022. It remains to be seen if this decline is a temporary response to the pandemic and a delayed 2022 Convention, or part of a long-term trend. Despite the drop in requests, these requests still account for the majority of time spent by the archivist doing in depth research. Historically these requests would result in a formal research report, although the current trend is moving away from formal reports (down to 24 formal reports for 2021-2023), and towards information that can be returned quickly to the requestor. Research reports do not include the ongoing legal research, which included 1,397 staff hours of research for legislation around Title IV issues, 39 inquiries into the history of individual trust funds, or 36 copyright/permissions requests. Additionally, 335 research reports were prepared for the legislative committees in advanced of the 2022 General Convention.

The following partial list documents the range of topics researched for the DFMS, General Convention, and interim bodies.

- History of the Episcopal Church in Micronesia and Guam
- The Episcopal Church in Liberia
- TEC Property Holdings in Honduras
- Ecclesiastical Authority in Non-Diocesan Designated Areas
- History of the Office of the Historiographer
- Insignia for House of Deputies
- Origins and Role of the Human Resource Committee of the Executive Council
- Executive Council Shareholder Resolution Terminology
- History of the Executive Council and National Council's BIPOC members
- Insurance Policy Holdings and Documentation
- Trust Fund Legacy Holdings
- Seabury House Trust Fund origins and history for GC 2022-A129
- Episcopal Seminary of the Caribbean Trust Fund origins and history for GC 2022-A129
- Copyright/Access Policies regarding Photography of past DFMS events
- Title IV Proceedings Regarding John Doe Legal Inquiries
- Legal Inquiry for Diocesan Litigation
- Human Resources Manual Holdings Including Safe Church Training

- Ecclesiastical Endorsement Procedure for Chaplains
- Defining the Relationship between the United Thank Offering and the Executive Council
- DFMS Records Retention for Legal Council Inquiry

External Research and Outreach

External research includes Episcopalians who are not engaged in formal work on behalf of the DFMS, or General Convention, as well as non-Episcopalian researchers, typically scholars and historians. Requests by church members saw a steady increase, up from 25% (2018-2020) to 33% (2021-2023). Scholarly requests have remained consistent at approximately 43% over the last three years. These requests often involve directing individuals to the Archives' online resources, but occasionally include large-scale research projects. The vast majority of visiting researchers are non-Episcopalians engaging in high level, academic research. Notably, 2023 saw a return to the pre-pandemic numbers of visiting researchers.

Also significant, many of the researchers are involved in long-term projects and have plans to return to the Archives in the near future. The Archives is currently scheduled out to February of 2024, with a hiatus for onsite research in the months immediately preceding the 2024 General Convention.

The following is a partial list of projects of external researchers supported by the Archives:

- Samuel Shoemaker: Shoemaker's role in the founding of Alcoholics Anonymous
- History of The Episcopal Church's response to the AIDS Crisis
- Alaska Missionary District and The Episcopal Church
- The Episcopal Church in the Confederate States of America and Sewanee's fund raising history
- Samuel Farmar Jarvis: Correspondence regarding American Gothic Revival architecture
- Bishop James Theodore Holly and the Episcopal mission in Haiti
- Okolona College, an HBCU in Chickasaw County Mississippi, history
- LGBTQ+ lay and clergy and their role in the Church
- American Church Institute for Negroes (ACIN) and higher education institutions involvement
- Episcopal Church in Liberia: Cuttington College
- Episcopal Church in Liberia: Early foundations of the Episcopal missions in Liberia
- Episcopal Church in Liberia: The Female Orphan Asylum of Liberia

- Mary Elizabeth Wood and the establishment of the western library system in China
- Philadelphia Eleven Documentary audio and video media support

Digital Archives

The Digital Archives continues to be the main portal through which users receive information from the Archives, with usage increasing from 37% of the web use in 2020 to 51% in 2023. The *Acts of Convention* is the most accessed resource, accounting for 30% of all traffic. New additions to the site, including the *Clerical Directories* and *The Spirit of Missions* have also been successful and will shape how the Archives develops its online offerings in the future.

Acts of Convention, 1973-2022

The Acts of Convention was updated in late 2023, following the publication of the General Convention Journal, to include the 339 official resolutions from the 2022 General Convention. Staff departed from established procedure, pulling data directly from the Legislative Processing System to generate the Acts data, and then comparing the data to the published Journal. This allowed Archives staff to front-load the data processing ahead of the availability of the Journal, a particularly important factor given the shortened triennium and the need to have Acts updated in time for the earlier start of the 81st General Convention.

Reports to General Convention from Official Bodies

The Digital Archivist updated the Reports to General Convention, adding 53 reports of the General Convention Interim Bodies. These reports were submitted in 2020, prior to the postponement of General Convention, and published without subsequent updates in 2021, therefore offering a unique perspective of the Church engaging in business during the pandemic.

Spirit of Missions

In 2022, the Archives staff digitized *The Spirit of Missions*, the official publication of the Board of Missions and the Domestic and Foreign Missionary Society from 1836 until 1939. Although the content and organization of the publication changed throughout its 103 years of publication, it stands as a rich and robust source of information into the missionary work and other social engagements of the Church. Following a positive reception to the addition of selected volumes of *The Spirit of Missions* to the Archives' website, the Archives is in the process of creating a formal digital archive with the complete run of *The Spirit of Missions*, which will include robust keyword searching.

Interim Bodies

In 2022, the Archives began the first steps in making available online the historic minutes of the Church's interim bodies. While currently limited to committee members and staff, the Archives expects this digital archive to grow and become widely accessible with time. It is anticipated that this new resource will include minutes from the Board of Missions (1820-1919), the National Council (1919-1963), Executive Council (1964-present), as well as numerous interim bodies.

Information and Technology Infrastructure

In July of 2023, the DFMS IT Director and the Archives staff initiated a long-term project aiming to integrate Archives technology more fully into that of the DFMS/Episcopal Church Center, allowing for improved stewardship and collaboration in the sharing of resources. During the IT Director's week-long visit to the Archives, short-term goals included: installing a new DFMS-supported firewall, configuring DFMS-supported laptops for flexible, hybrid workflows, configuring an improved WIFI network, and identifying data storage needs. The firewall was setup, providing Archives staff direct access to remote network stores, and will greatly improve the ease of access and data flow for future records retention work by the Records Management Office. While it will take time to fully realize identified long-term goals, the trip was incredibly successful in rebuilding the collaborative relationship between IT and Archives.

Acquisition and Access

Historic records acquisition for the period of 2021 to 2023 amounted to approximate 821 cubic feet of paper records and 8.8 TB of electronic records. Due to the move and the departure of the Director, the Archives has not been actively soliciting historical records from non-DFMS entities. Despite this, many ongoing engagements prior to the Director's retirement came to fruition as we have seen an increase in individual seeking to donate records to the Archives. With the continued work-from-home situation and the departure of the Records Manager in 2021, records received by the Records Management Office diminished greatly with 22 cubic feet of paper records and 260 GB of electronic records received. With the return of staff to ECC in the fall of 2023, and the hiring of Carlinthia Cox as the new Records Manager, we anticipate engaging in an aggressive records retention campaign in the next triennium, particularly focusing on the acquisition of electronic records. The trend of diminishing paper records is expected to continue with perhaps a few cycles before paper records become the exception to the norm.

Between 2022 and 2023, archivists conducted archival appraisal, processing, and description that resulted in 17 formal finding aids, representing 200 cubic feet of fully processed records. Additionally, archivists created inventories for 43 collections, representing 268 cubic feet of archival records.

The following is a partial list of fully processed and minimally processed records:

- Papers of Dr. Charles Radford Lawrence II and Dr. Margaret Lawrence, 14 cu.ft.
- Records of the Episcopal Theological School, 67 cu.ft.
- Records of the Philadelphia Divinity School, 24.4 cu.ft.
- Records of the Association of Anglican Musicians, 5 cu.ft.
- Records of Instituto Pastoral Hispano, 19 cu.ft.
- Office of the Presiding Bishop, 20.7 cu.ft.
- Papers of George Hodges, 12 cu.ft.
- Papers of the Sherman Family, 4.35 cu.ft.
- Papers of Pamela Chinnis, 11.5 cu.ft.
- Pennington-Jarvis Collection, 1.75 cu.ft.
- Papers of Daisuke Kitagawa, 10.15 cu.ft.
- Papers of John Kitagawa, 4.4 cu.ft.
- Papers of Ian Douglas, 11 cu.ft.
- Papers of Sandra McPhee, 3 cu.ft.
- Records of Province VIII, 11 cu.ft.
- Records of the Association of Episcopal Colleges, 12 cu.ft.
- Records of the Diocese of Liberia / Papers of Rt. Rev. George Browne, 15 cu.ft.
- Records of The Archives of the Episcopal Church, 57 cu.ft.
- Records of the Registrar of Conscientious Objectors, 3 cu.ft.
- Records of Venture in Mission, 10 cu.ft.
- Records of National Episcopal Historians and Archivists, 28 cu.ft.
- Historical Society of the Episcopal Church Journals, 12 cu.ft.
- Episcopal Media Center Reels and Records of C.S. Lewis Productions, 14.4 cu.ft.
- Episcopal Church Annuals, 18 cu.ft.

Offsite Storage

In 2022 and 2023 the staff initiated and completed the work of removing approximately 2,000 cubic feet of records from Iron Mountain. This multi-faceted project allowed for reappraisal of records stored

offsite in order to recycle duplicate publications, consolidate poorly housed collections, update existing finding guides, and prepare those records for transfer to a local, more responsive offsite vendor, SafeSite. The move to SafeSite will stabilize offsite storage costs by eliminating service fees imposed by Iron Mountain. The overall monthly storage costs will not decrease, however, there will be a marked increase in the ease of transfer, retrieval, and storage of records with no hidden fees for other services.

Records Center

In 2023, the Records Manager completed a stacks-wide audit of the entire collection, including the primary records center, the small “temporary” records center, and the flat file storage. In response to this audit, the Archives staff transferred 991 cubic feet of records flagged for permanent retention from New York to Austin. Additionally 147 cubic feet of records were destroyed under the records retention schedule and an additional 907 cubic feet of records have been flagged for destruction when the circumstances allow. Much of this work was completed in anticipation of construction to be completed by Building Services in 2024, which necessitated the Archives empty the small records center as well as approximately three aisles of collections at the back of the primary record center.

A New Temporary Home

The Archives took possession of its new home at 107 Denson Drive in April of 2021. The move of the physical collections took an incredible group effort and was not declared complete until late January 2022 once a holdings location audit was accomplished with an approximate 3% error rate corrected. All intellectual controls reflect the current facility and have proven to be accurate with daily use.

Along with getting the holdings placed, audited, and stabilized a number of physical plant challenges had to be addressed over the period of occupancy of the space. The primary concern related to the facility was the repeated encroachment of water through the roof, walls, and windows into the interior of the building. Fortunately, the archival collections were not negatively affected, and in late fall of 2022, work began on the installation of a new roof, with cost borne by the landlord. The new roof, the sealing, and painting of the exterior wall, and the installation of the awning have taken care of all the leaks that were experienced for the first two years of our tenancy in the building. Large exposed windows in the Reading Room, Staff Room, Work Room and the Director’s Office required purchase and professional installation of window treatments to mitigate heat and UV damage in these spaces. That was accomplished in mid-2023 and has made a marked difference in those spaces. A further pressing need and goal achieved in 2023 was the replacement of sub-par office furniture that was having a negative affect on the health and well-being of the staff.

While the Denson facility is an improvement over the previous situation, the Archives staff are aware that this is a temporary home that does not meet the Archives’ needs and is not capable of holding the entire collection, which is currently housed among 4 locations. The acquisition of materials is always conducted with an eye towards available space and resources; as once a donation is accepted, the

Archivist has a professional duty to uphold the trust place in us to provide for the permanent housing, preservation, safekeeping, and access to the materials. For the first time, the Archives was unsuccessful in a significant acquisition opportunity due to its uncertain future and physical space. It continues to be of the utmost importance that The Episcopal Church find a permanent home for the Archives that will allow it to fulfill its mission and continue to connect the Church's history with its ongoing ministries.

Acknowledgments

The Archives curatorial and technical support team accomplished a tremendous amount of work in demanding and unconventional circumstances. They met these challenges with a professionalism and grace that defines the very core of this institution. Their dedication to cooperation, and willingness to seek innovative solutions and push the boundaries as information professionals will benefit the Archives and The Episcopal Church for years to come.

Special appreciation goes to Administrative Deputy, David Hales, whose unwavering support and good humor sets the tone for the entire staff. As Research Archivist, Amy Evenson leaned into the demands of modern research in the age of the Internet, educating more than a few along the way. Collections Manager Sarah Sauri managed the many moving parts, and indeed boxes, with accuracy and aplomb. 2021 saw the retirement of Corrinne Collett. During her 14 years of exceptional service as the Records Manager, Corrinne oversaw the development of the records retention program and the Digital Repository. Carlinthia Cox came into the role of Records Manager with a willingness to learn and has adapted to her role with energy and thoughtfulness. We are forever grateful to the following Archives Assistants: Katie Buonanno, Leah Christian, Keely Drummond, Rothko Hauschildt, and Karen Twer and our contracted consultants Rachael Gilg and Patrick Goetz whose expertise and collaboration supports our work in so many ways.

It is impossible, to recognize the good work of the Archives staff without acknowledging the foundation that allows it to thrive. Mark J. Duffy's guidance through 30 formative years in building the collection to reflect the many diverse voices of The Episcopal Church, and to elevate the story of the individual within the identity of the whole cannot be overstated. Mark's full-hearted dedication established this Archives as one of the premier religious archives in the country and one with a reputation of continuing professional excellence and innovation. For Mark's dedication as leader, mentor, and friend, without whom this Archives, nor this Archivist would exist as they do, I am grateful.

Whitney R. Hughes Interim Director November 30, 2023

BOARD OF TRANSITION MINISTRY

Members

The Rev. Dr. Stephen H. Applegate	Southern Ohio, V	2027
The Rt. Rev. Lucinda Ashby	El Camino Real, VIII	2027
The Rev. Dr. Gary Butterworth	Western North Carolina, IV	2024
The Rev. Victor H. Conrado	Chicago, V	2024
The Rt. Rev. Elizabeth Bonforte Gardner	Nevada, VIII	2024
The Rt. Rev. Michael C.B. Hunn	Rio Grande, VII	2027
The Rt. Rev. Craig Loya	Minnesota, VI	2024
Ms. Ellen McVey	Eastern Michigan, V	2024
Dr. Sandra Montes	Texas, VII	2027
Mr. Jon Rania	Delaware, III	2027
The Rev. Canon Amy Real Coultas	Kentucky, IV	2027
Mrs. Anne Schmidt	Dallas, VII	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	n/a
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	n/a

Mandate

Canon III.16.1 - 2

Sec. 1.

- a. There shall be a Board for Transition Ministry of the General Convention consisting of twelve members, four of whom shall be Bishops, four of whom shall be Presbyters or Deacons, and four of whom shall be Lay Persons.
- b. The Bishops shall be appointed by the Presiding Bishop. The Priests or Deacons and Lay Members shall be appointed by the President of the House of Deputies. All appointments to the Board shall be subject to the confirmation of the General Convention.
- c. The Members shall serve terms beginning with the adjournment of the meeting of the General Convention at which their appointments are confirmed, and ending with the adjournment of the second regular meeting thereafter. The members shall not serve successive terms.
- d. At each regular meeting of the General Convention one-half of the membership shall be appointed to serve full terms.

e. Vacancies shall be filled by appointment by the Presiding Bishop or by the President of the House of Deputies, as appropriate. Such appointments shall be for the remaining unexpired portion of the members' terms, and, if a regular meeting of the General Convention intervenes, appointments for terms extending beyond such meetings shall be subject to confirmation of the General Convention. Members appointed to fill the vacancies shall not thereby be disqualified from appointment to full terms thereafter.

Sec. 2. The duties of the Board shall be:

- a. To oversee the Office for Transition Ministry.
- b. To provide support for the training of bishops and diocesan personnel in the transition ministry processes.
- c. To study the transition ministry needs and trends in the Episcopal Church and in other Christian bodies.
- d. To issue and distribute such reports and information concerning transition ministry as it deems helpful to the Church.
- e. To cooperate with the Centers for Mission and the other Boards, Commissions, and Agencies which are concerned with transition ministry, and particularly with the Executive Council.
- f. To report on its work and the work of the Office for Transition Ministry at each regular meeting of the General Convention.
- g. To report to the Executive Council annually as a part of its accountability to the Council for the funding which the Office for Transition Ministry receives.
- h. To work in cooperation with the Church Center Staff.
- i. To fulfill other responsibilities assigned to it by the General Convention.

Summary of Work

As there are many changes throughout The Episcopal Church, the landscape of Transition Ministry also is changing, with clergy availability and congregational structure among major factors.

Diocesan Transition Ministers - Transition Ministers meet twice yearly in 4 self-organized regional groups: Province VIII, Provinces V-VI-VIII, Province IV, and Transition Ministry Conference which comprises Provinces I-II-II and parts of IV and V. Province IX approaches transition ministry in a different way than most US domestic dioceses.

In March 2022 Transition Ministers from Provinces I-VIII gathered for a time of mutual learning and collaboration. A major focus continues to be improving processes that foster equality and inclusion across search and call processes. Another gathering is planned for March 2025.

Changing landscape - Looking at parochial report information for the year 2010, 74% of parishes were full-time clergy positions. Just 12 years later in 2022, 46% of parishes had full-time clergy.

From regional Transition Minister meetings in Spring 2023, a snapshot of information showed there were 288 full-time positions shared, 333 part-time positions, and 87 clergy who had indicated they were actively in search at that time. (Notation on this information: Not all dioceses attended Spring meetings, each diocese/region reports slightly differently, this information gives a general sense of the transition landscape, clergy currently in search numbers are approximate and reported by each Diocesan Transition Minister in attendance at regional meeting.)

The Office for Transition Ministry is staffed by 2 people, a Director and a Technical Specialist. The office daily supports bishops, diocesan staff, clergy and lay leaders, seminaries, church affinity groups, and others across all time zones throughout the Church. The office also trains most new Diocesan Transition Ministers.

During this biennium, the Director collaborated closely with the General Convention Office and the Research Department of Church Pension Group to provide coordinated information and trends to church decision makers from the parochial report, CPG clergy statistics, and transition ministry data. Presentations were shared with the House of Bishops, Executive Council, seminary deans, Episcopal Business Administrators Conference, Stevenson School for Ministry, College for Bishops, International Black Clergy Conference, and Province VIII leaders. Future presentations are planned.

The office continued work on updating the online database user interface which will debut soon after the 81st General Convention. The interface will include new functionality and updated translation for Spanish and French, along with implementation of General Convention applicable resolutions.

The office works closely with the Episcopal News Service Jobs & Calls site. The Board extends appreciation to Episcopal News Service who increased the time of free posting for parish openings to 1 month from 2 weeks.

While the Board did not convene as a whole this biennium, members continued to engage the work of transition ministry and the office's work. Looking ahead, the Board will convene in the next triennium and continue to analyze the transition ministry landscape, promote equity and inclusion, and address emerging issues.

THE CHURCH PENSION FUND

Board of Trustees	Diocese, Province	End of Term
Canon Kathryn McCormick, Chair	Mississippi, IV	2024
Canon Rosalie Simmonds Ballentine, Esq., DHL, Vice Chair	The Virgin Islands, II	2024
The Rt. Rev. Brian N. Prior, Vice Chair	Alabama, IV	2027
The Rt. Rev. David A. Alvarez, PsyD	Puerto Rico, II	2027
The Rev. Dr. Brendan Barnicle, DMin	Oregon, VIII	2027
The Rt. Rev. Diane M. Jardine Bruce, DMin, DD	West Missouri, VII & VIII	2024
The Very Rev. Samuel G. Candler	Atlanta, IV	2024
The Rt. Rev. Clifton Daniel III	New Jersey, II	2024
The Rt. Rev. Ian T. Douglas, PhD	Connecticut, I	2027
Delbert C. Glover, PhD	Washington, III	2024
The Rev. Amy Haynie	Northwest Texas, VII	2027
The Rt. Rev. Julio Holguín	Dominican Republic, IX	2024
The Very Rev. Cynthia Briggs Kittredge, ThD	Texas, VII	2027
Ryan K. Kusumoto	Hawaii, VIII	2024
The Rev. Dr. Gawain F. de Leeuw, DMin	New York, II	2027
John McCray-Goldsmith	El Camino Real, VIII	2027
Sandra Ferguson McPhee, Esq.	Maine, I	2027
Yvonne O'Neal	New York, II	2024
Solomon S. Owayda	Massachusetts, I	2024
The Rt. Rev. Gregory H. Rickel	Southeast Florida, IV	2027
The Rev. Austin K. Rios (Bishop-Elect)	Convocation of Episcopal Churches in Europe, II	2024
Canon Anne M. Vickers	Southwest Florida, IV	2027
The Hon. Linda E. Watt	North Carolina, IV	2024
The Very Rev. Sandye A. Wilson	Newark, II	2027
Mary Katherine Wold, Esq.	New York, II	

Mandate

Title I, Canon 8: Of The Church Pension Fund

Clergy and lay pension and health plans. **Sec. 1.** The Church Pension Fund, a corporation created by Chapter 97 of the Laws of 1914 of the State of New York as subsequently amended, is hereby authorized to establish and administer the clergy pension system, including life, accident and health benefits, of this Church, substantially in accordance with the principles adopted by the General Convention of 1913 and approved thereafter by the several Dioceses, with the view to providing pensions and related benefits for the Clergy who reach normal age of retirement, for the Clergy disabled by age or infirmity, and for the surviving spouses and minor children of deceased Clergy. The Church Pension Fund is also authorized to establish and administer the lay employee pension system and denominational health plan of the Church, substantially in accordance with the principles adopted by the General Convention of 2009 in Resolution 2009-A177, with the view to providing pensions, health care and related benefits for the eligible Clergy and eligible lay employees of this Church, as well as their eligible beneficiaries and dependents.

Overview

The Church Pension Fund (CPF)¹ was established as a not-for-profit corporation in the State of New York in 1914. In 1916, The General Convention enacted the predecessor to Title I, Canon 8, which gave CPF the authority to administer pensions and other benefits for eligible Episcopal clergy and to collect assessments to fund such benefits. CPF's charter, the official founding document, gave the original trustees the authority to adopt a constitution that, among other things, provides that there will be 25 trustees of CPF, 24 of whom are elected by the General Convention and one of whom is the president of CPF. Copies of CPF's founding documents are available on CPF's website.²

Three Lines of Business

Today, CPF and its affiliates, collectively the Church Pension Group (CPG), operate three lines of business³ for the benefit of The Episcopal Church (the Church):

1. Employee benefits, which include pension, health, life insurance, disability, and other products and services available to eligible clergy and lay employees
2. Property and casualty insurance to protect Episcopal buildings and cover other liabilities incurred by Episcopal institutions

3. Publishing, which provides core liturgical materials such as The Book of Common Prayer, academic publications by religious scholars, and books on financial wellness and retirement readiness, as well as other books of interest to persons of faith

CPG also provides a full range of research, education, and benefits administration support to ensure that it is meeting the needs of the institutions and people it serves.

Investments

CPF collects assessments from Episcopal institutions and invests those funds in the financial markets to make sure it has sufficient assets to cover the cost of the pension and related benefits that have been promised to the clergy and lay employees of the Church. CPF's investment performance is critical, as assessments paid to CPF do not cover the full cost of benefits, other support, and administration.

Ensuring that CPF has sufficient assets to cover its commitments to the clergy and lay employees of the Church and their beneficiaries, which it has done without interruption for more than 100 years, is the primary focus of CPF's investment strategy. CPF also engages in socially responsible investing⁴ to the extent possible, remaining consistent with its fiduciary duties. CPF's socially responsible investing strategy includes these practices:

- **Investing for Positive Impact:** proactively seeking out and investing with managers who deliver both strong returns and positive social impact
- **Shareholder Engagement:** using CPF's position as an institutional investor to address corporate social responsibility of companies in the investment portfolio
- **ESG Incorporation:** considering material environmental, social, and governance (ESG) issues as part of CPF's investment analysis and review
- **Thought Leadership:** sharing CPF's experience and industry relationships to catalyze growth and advance best practices in socially responsible investing

Core Values: Professional. Compassionate. Trustworthy.

The Church Pension Group is based in New York City and also has offices in Vermont and Hong Kong. Its employees are committed to the organization's purpose, which is to support the clergy and lay employees of the Church in their calling to spread the gospel. CPG's core values of professionalism, compassion, and trustworthiness keep everyone focused on the needs and values of the people they serve. Leadership at CPG extends these core values by making diversity, equity, and inclusion (DEI) a component in employee performance evaluations in order to foster different perspectives and improve decision-making around CPG's products, programs, and services.

Summary of Work

This Blue Book submission summarizes CPG's work since the 80th General Convention. For additional details about the benefits, property and casualty coverage, and publishing products and services CPG provides its clients, please view the 2023 CPG Annual Report.⁵

Benefits Policy and Design

To provide its clients with the highest possible level of financial security in retirement consistent with exemplary financial stewardship on its part and with the evolving needs of the Church, CPG offers a variety of pensions, retirement savings programs, and health, life, and disability products for eligible clergy and lay employees, as described below. CPG continues to engage in discussions with clergy and lay employees regarding options that are available to the Church to achieve pension parity, as reported in CPF's responses to Resolution 2018-A237⁶ and Resolution 2018-Do45⁷.

- **The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan)**⁸ is a defined benefit pension plan. All ordained clergy in the US, US Virgin Islands, the Convocation of Episcopal Churches in Europe, and Micronesia are eligible to participate in the Clergy Pension Plan if they meet certain minimum criteria and pension assessments are paid on their behalf. The current assessment rate is 18% of each clergyperson's Total Assessable Compensation.
- In addition to being provided lifetime income following retirement, eligible participants in the Clergy Pension Plan may be eligible to receive other benefits, including a post-retirement health subsidy, life insurance, disability benefits, a resettlement benefit, a Christmas benefit, and death benefits, including a benefit paid to eligible children of deceased clergy. Clergy can supplement their Clergy Pension Plan benefits with personal retirement savings through **The Episcopal Church Retirement Savings Plan (RSVP)**,⁹ which is a voluntary defined contribution plan.
- Eligible Episcopal clergy who serve in a non-domestic diocese of the Church and clergy who are canonically resident in a diocese of the Anglican Communion that is part of the Iglesia Anglicana de la Región Central de América (IARCA) participate in a different defined benefit pension plan called the **International Clergy Pension Plan (ICPP)**.¹⁰ The ICPP has many of the same generous features as the Clergy Pension Plan, and eligible participants may receive a monthly subsidy to help with the cost of healthcare in retirement. Minor differences between the two plans address the unique needs of clergy in non-domestic dioceses.¹¹ CPF continues to provide benefits to eligible vested clergy in former participating dioceses in Brazil and the Philippines, subject to the rules that were in effect when a clergyperson last earned credited service under the applicable plan.

- CPF also administers companion clergy pension plans that are sponsored and controlled by The Anglican Church of Mexico¹² and The Episcopal Church in Liberia, as well as a pension plan for lay employees in the Diocese of Puerto Rico¹³ that is sponsored and controlled by that diocese.
- In accordance with General Convention Resolution 2009-A138 and its associated Canon, eligible lay employees must participate in either **The Episcopal Church Lay Employees' Retirement Plan** (Lay DB Plan),¹⁴ which is a defined benefit plan, or **The Episcopal Church Lay Employees' Defined Contribution Retirement Plan** (Lay DC Plan),¹⁵ which is a defined contribution plan. The overwhelming majority of eligible lay employees participate in the Lay DC Plan. Under General Convention Resolution 2009-A138, employers who opt to participate in the Lay DC Plan are required to contribute at least 5% of the employee's compensation and match at least 4% of the employee's contributions. Employers are required to pay 9% of compensation for each lay employee participating in the Lay DB Plan.
- The Church Pension Group offers a variety of educational resources in person and online¹⁶ to ensure that eligible clergy and lay employees understand their pension and related benefits.
- The Church Pension Group has continued to broaden access to its resources, products, and services for international clients. It has increased the number and variety of administrator and member education materials, as well as publications, available in Spanish, French, and/or Mandarin.¹⁷ CPG has hosted international administrators at churchwide educational events and continues to look for ways to provide professional, compassionate, and trustworthy care to the people and institutions that make up the Church, regardless of region.

Enhancements to Pension, Welfare, and Retirement Savings Plans

Since the last General Convention, CPF has worked to find solutions that address the needs of current and future retirees.

- **Purchasing Power Adjustment Under the ICPP**—Because US inflation may not fully account for the impact of local inflation and exchange rates on ICPP retirees and beneficiaries, we conduct an analysis every three years to determine whether ICPP retirees and beneficiaries living in a particular country have experienced a loss in purchasing power. CPF makes necessary benefit adjustments when there has been a loss in purchasing power, with any such adjustment being capped at 5%.

- CPF performed a purchasing power analysis in 2023 (covering the period from October 1, 2020, until September 30, 2023), and the CPF Board granted a purchasing power adjustment, effective January 1, 2024, to eligible retirees and beneficiaries living in nine countries. This purchasing power adjustment is in addition to the annual, discretionary cost-of-living adjustments (COLA)¹⁸ that the CPF Board granted effective January 1, 2023, and January 1, 2024. The next purchasing power adjustment analysis will be conducted in 2026.
- **Reduced Defined Contribution Recordkeeping, Administrative, and Investment Fees**—The defined contribution plans offered by CPF are a key component in planning for financial security in retirement. CPF has worked to decrease the annual recordkeeping fee for the plans by approximately 25% and, effective April 1, 2022, changed its annual administrative fee from a basis point fee to a flat fee per participant. CPF has also been able to leverage the size of the defined contribution plans to move to lower fee share classes when available, which has resulted in reduced investment management fees paid by plan participants.
- **Post-Retirement Health Subsidy**—CPF recently increased the monthly post-retirement health subsidy provided to eligible retired clergy with at least 10 years of Credited Service under the Clergy Pension Plan—and their eligible spouses. The size of the subsidy is commensurate with years of earned Credited Service. The full subsidy will increase from \$286 per person in 2023 to \$317 per person in 2024¹⁹.
- **Increase in Early Retirement Bridge Benefit**—Beginning January 1, 2024, the monthly bridge benefit to help eligible participants in the Clergy Pension Plan defray the cost of healthcare will increase from \$17.50 to \$31.00, multiplied by years of Credited Service. To qualify for this benefit, eligible clergy must retire at or after the early retirement age of 55 with 30 or more years of Credited Service.
- **Increase in Clergy Short-Term Disability Benefit Weekly Maximum**—The short-term disability benefit for active clergy participating in the Clergy Pension Plan and ICPP continues to be 70% of an eligible participant’s weekly compensation on which assessments were paid up to a maximum weekly benefit. If short-term disability is approved for a disability starting on or after January 1, 2024, the weekly maximum will increase from \$1,000 to \$1,500.

Emergency Funding

The Fund for Special Assistance provides grants to a retired cleric or a surviving spouse or dependent of a deceased cleric who is experiencing a specific financial challenge and is also receiving benefits from the Clergy Pension Plan, The Church Pension Fund Clergy Child Benefit Plan, The Church Pension Fund Clergy Long-Term Disability Plan, or any pension plan sponsored and administered by CPF for the

benefit of Episcopal clergy in Episcopal dioceses outside the US. (IARCA clergy and their families are not eligible.) CPF made individual grants totaling \$25,000 in 2022 and \$28,000 through September 2023 under this program. CPG continues efforts to increase awareness of this benefit because utilization remains low.²⁰

The Fund for Medical Assistance provides financial assistance with medically necessary healthcare expenses to eligible active or retired clergy, lay employees, and their dependents in non-domestic dioceses who are facing healthcare expenses that are not otherwise covered by public or private insurance programs in their countries. CPF made individual grants totaling \$83,200 in 2022 and \$52,019 through September 2023 under this program. For more details, read about the Fund for Medical Assistance.²¹

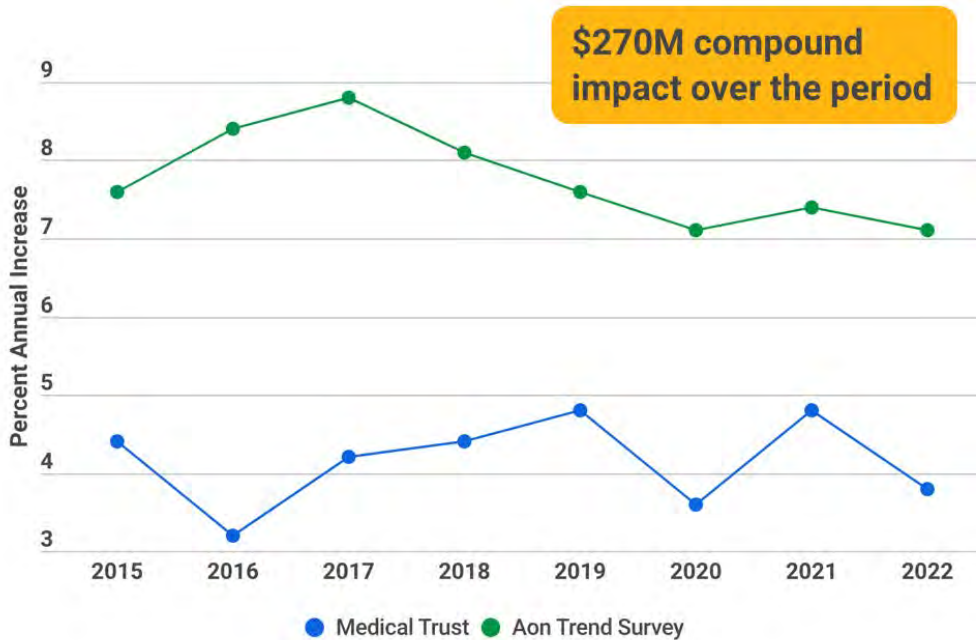
Providing Broad Access to High-Quality Healthcare

Since its inception in 2009, the Denominational Health Plan (DHP) has made valuable healthcare coverage available to eligible clergy and lay employees and their eligible dependents, while delivering on its commitments to manage overall healthcare costs for the Church, reduce disparity between clergy and lay employees in funding of healthcare benefits, and reduce cost disparity among dioceses. As the administrator of the DHP for the entire Church, The Episcopal Church Medical Trust (Medical Trust) continues to look for ways to improve the quality of care its members receive while also exploring ways to control the rising cost of care. Please read the DHP Annual Report for details.²²

Controlling Healthcare Costs

The DHP leverages the collective purchasing power of its participants to offer comprehensive coverage at a lower cost in aggregate than if dioceses purchased coverage separately.

The DHP's annual average cost increases in recent years have ranged from 4% to 6%, versus 7% to 9% for other large employers during the same period. The chart below shows this comparison since 2015, which results in a \$270 million compounded impact.



In 2023, cost increases continued to be on the lower end of national trends. The Medical Trust delivered an average annual increase of 4.4% as compared to an estimated national trend of 5.6% to 8%.²³

New Offerings and Initiatives

GROUP MEDICARE ADVANTAGE—ENHANCED RETIREE HEALTHCARE BENEFITS

CPG introduced a Group Medicare Advantage²⁴ plan to retirees in 2022 offering improved value, lower cost, and easier benefits management than the prior retiree health plan. Overall, the program is delivering as expected.

PRESCRIPTION DRUG CHANGES

The Medical Trust increased the cost share for prescription drugs to be more in line with the broader market, including the introduction of a specialty drug tier. In addition, a coinsurance design (versus copay-based) was introduced to maintain cost-sharing levels going forward.

CHANGES TO HOW SPECIALTY DRUGS ARE COVERED

With typical benefit plans, some specialty drugs are covered by the medical channel of the plan, while others are covered by the pharmacy channel. This leads to confusion about how to access the specialty medication and poses cost-containment challenges. With the Medical Trust's Anthem and Cigna medical plans, certain specialty drugs are now excluded from the medical benefit and are instead covered exclusively within the Express Scripts pharmacy benefit. This "medical channel management" results in more consistent clinical coverage criteria, better management of healthcare services, and cost savings.

NEW SERVICES FOR MUSCULOSKELETAL HEALTH

Treatment of musculoskeletal conditions is one of the Medical Trust's top claim costs. CPG added Hinge Health services for Anthem and Cigna plans to help reduce member expenses and increase quality through digital solutions for musculoskeletal pain and injuries. The Expert Second Opinion feature provides medical expert reviews for back, knee, or hip surgeries that can help control costs and lead to better patient outcomes.

ADDITIONAL PLAN ENHANCEMENTS

Other health benefits that have been enhanced by the Medical Trust are the lifetime maximum for fertility benefits, the benefit for hearing aid devices, the annual allowance for eyeglass frames and contact lenses, and coverage for vaccines for personal travel.

DENOMINATIONAL HEALTH PLAN TASK FORCE

The 80th General Convention approved Resolution 2022-D034, creating a task force to review the structure and offerings of the DHP, in consultation with CPG, and report back to the 81st General Convention with a list of options to reduce healthcare costs across the Church, with a full explanation of the reasoning, costs, and benefits of each option.

CPG supported these task force efforts through the participation of CPF Board Chair Kathryn McCormick and CPG Executive Vice President and Chief Operating Officer Frank Armstrong.

Additional details on the work of the task force can be found in its report to the General Convention.

The Church Insurance Companies: Property and Casualty Insurance

PROTECTING THE PEOPLE AND PROPERTY OF THE CHURCH

For nearly 100 years, The Church Insurance Companies (CIC)²⁵ has focused on providing the Church broad, cost-effective property insurance and, more recently, casualty insurance coverage, along with robust risk management strategies and tools in a financially sustainable way. CIC continues to be proactive in addressing the needs of Church properties and people through its insight, education, collaboration, and coverage.

- **Risk management education**²⁶—CIC has increased its focus on education, to help every client and potential client understand the cost and importance of appropriate coverage. Lower premiums are not always the answer, particularly when they come with higher deductibles that may be impossible to fund when unexpected disasters strike. CIC also offers several programs and initiatives to help clients proactively manage risk.
- **Adapting to climate change**²⁷—CIC works with its clients to help them take action to reduce the potential financial impact of a storm or other occurrence. One example is providing checklists for clients' use in advance of major weather events to help them take the necessary precautions.
- **Premium increases**²⁸—Several factors affected insurance costs in 2023. More frequent and severe weather events resulting from climate change, increased construction costs, and higher property valuations continued to affect property and casualty insurance markets. CIC is not immune to these and other market forces, which are driving increases in insurance premiums:

CIC, like other property and casualty insurers, purchases its own insurance (reinsurance) to cover portions of the largest claims. Reinsurance subsidizes the cost of large claims and protects CIC's financial sustainability. For a variety of reasons, the cost of reinsurance and the premiums CIC pays to its reinsurers have risen substantially.

With the increase in the number and intensity of weather-related events, CIC continues to experience increasing claims activity related to weather.

Dramatic increases in building materials, labor, and overall construction costs make it more expensive to restore damaged properties.

To offset these increased costs, most CIC clients will see unavoidable premium increases in 2024. However, they also will experience an increase in risk management service and support to assist in reducing losses and better preparing for weather events.

Church Publishing Incorporated: Spreading the Word

Church Publishing Incorporated (CPI),²⁹ founded in 1918, is a multi-faceted publisher and supplier to The Episcopal Church and the broader ecumenical marketplace. CPI produces some 50 new books each year, under three distinct imprints, and manages a portfolio of more than 1,042 active publications, many of which are sold worldwide. CPI also publishes electronic resources (including RiteSong, RitePlanning and RiteFormation), lectionary inserts, and other church supplies.

Three Publishing Imprints

Church Publishing produces official worship materials and resources for The Episcopal Church, such as hymnals, prayer books, and books for clergy. Recent publications of the new Spanish and French translations of The Book of Common Prayer, and a globally available bilingual selections edition, reflect CPI's commitment to increasing access to worship materials and ensuring the widest possible readership. In addition, Church Publishing released *A Women's Lectionary for the Whole Church: Year B*—the newest installment of the definitive gender-expansive biblical translation.

Supporting the work of scholars and championing important research, **Seabury Books** specializes in academic books on religion and theology.

Morehouse Publishing offers trade books designed to inform and inspire on select topics including leadership, inspiration, self-improvement, social justice, and thought leadership relevant to the Church.

The Church Pension Fund and Affiliated Companies

The Church Pension Fund	Participants/Beneficiaries	
Clergy Pension Plan	17,910	
Lay Defined Benefit Plan	7,268	
Lay Defined Contribution Plan	19,883	
RSVP Plan	4,814	
The Episcopal Church Medical Trust		
Clergy		
Active	3,880	}
Retired and surviving spouses	5,262	
Lay employees		
Active	11,527	
Retired and surviving spouses	2,690	39,575
Family members of		
Active (clergy & lay employees)	11,361	
Retired (clergy & lay employees)	4,855	
Church Life Insurance Corporation		
Group life insurance	22,877	
Individual life insurance	809	
Annuities	1,080	

The Church Insurance Companies

The number/percentage of domestic Episcopal churches and dioceses that purchase their property and casualty insurance from The Church Insurance Company of Vermont or The Church Insurance Agency Corporation

Churches	6,016 / 91%
Dioceses	96 / 96%

Church Publishing Incorporated

Books in print	999
eBooks	865
eProducts	7
Church supplies	24

As of September 30, 2023

Practicing Exemplary Financial Stewardship

NEW CHIEF INVESTMENT OFFICER

Michael Hood was named Executive Vice President, Chief Investment Officer, and Managing Director in July 2023, following the retirement of Roger Saylor, who served in the role for nine years. Michael is a highly accomplished investment professional with extensive expertise in economics, asset allocation, and portfolio strategy. He formerly served as a managing director in JPMorgan Asset Management's Multi-Asset Solutions division, where he helped oversee diverse portfolios totaling \$350 billion. View a video to learn more about Michael.³⁰

ASSETS UNDER MANAGEMENT

As of September 30, 2023, the value of CPF's portfolio was \$16.8 billion, compared to \$16.6 billion as of September 30, 2022. Assets available for benefits in the Clergy Pension Plan were \$16.1 billion and assets available for benefits in the Lay DB Plan were \$259 million. Financial markets have been challenging since the beginning of 2022, but CPF's financial condition continues to be strong. Over the past 10 years, CPF generated an annualized return of 7.8%, exceeding its investment goal of 7.2% and the market benchmark of 5.5%.

STRESS TESTING AND EXPENSE MANAGEMENT

CPF uses a variety of tools to assess and manage its financial strength. For example, it stress tests its pension assets and liabilities annually to determine its level of confidence that it will have enough assets in future years to meet obligations to pension plan participants. Recent stress tests of the Clergy Pension Plan and Lay DB Plan show that CPF has an appropriate level of assets to honor future commitments, assuming current policies. However, these stress tests also show that the Lay DB Plan is in a weaker financial position than the Clergy Pension Plan, and the CPF Board continues to take a more conservative approach to plan benefits. For example, the CPF Board did not grant a discretionary COLA for the Lay DB Plan because doing so would have compromised the financial strength of the plan. CPF also continues to apply robust financial discipline in managing expenses. CPF applies a cost-value lens to every major decision, to make sure the money it spends is yielding expected and necessary benefits for the people and institutions CPF serves.

Understanding the Evolving Church

DEMOGRAPHIC TRENDS

In its role of Recorder of Ordinations, CPG continues to collect and report on clergy demographic data. Since the last General Convention, CPG's Research and Recorder of Ordinations team joined forces with leaders at The Domestic and Foreign Missionary Society to offer insights on clergy demographic trends to audiences across the Church, including presentations on trends in clergy ministry.³¹

In addition, for the first time, CPG produced a Lay Employment and Compensation Report,³² highlighting lay employment and compensation trends across the Church. The report offers a look at demographic, geographic, and compensation differences among domestic lay employees enrolled in CPF retirement plans.

Church Pension Fund Governance

CPF is governed by a 25-member board of trustees. Twenty-four are elected by General Convention to serve for six-year terms. The 25th trustee, CPF's Chief Executive Officer and President, is elected by the CPF Board and serves at its will.

THE WORK OF THE CPF BOARD

With input from CPG's Executive Leadership Team, the CPF Board makes critical policy decisions affecting investment strategy, pensions, and other benefits and services. It oversees the strategic direction of the broad and varied consortium of businesses that make up CPG, while ensuring that the financial strength of the organization remains intact.

The participation on the CPF Board of lay and ordained Church leaders, as well as experienced investment managers, attorneys, and business and financial professionals, all enrich the work of the CPF Board. It is essential to bring to the board's deliberations the most expert and thoughtful advice available to the Church. The complexity of CPG's businesses and the legal responsibilities associated with the work of the CPF Board require that each trustee be informed and fully engaged.

CPF BOARD ELECTIONS

As set out in the Canons of The Episcopal Church, each General Convention elects 12 trustees of CPF (plus the number of trustees needed to fill any vacancies), selecting from the slate of nominees presented by the Joint Standing Committee on Nominations.

Six current trustees—the Very Rev. Samuel G. Candler, the Rt. Rev. Clifton Daniel III, the Rt. Rev. Julio Holguín, Yvonne O’Neal, the Rev. Austin K. Rios (Bishop-Elect), and the Honorable Linda E. Watt—were elected to their first six-year terms at the 2018 General Convention and are eligible for re-election at the upcoming General Convention. However, both the Rt. Rev. Clifton Daniel III and the Rt. Rev. Julio Holguín have indicated that they will not stand for re-election.

The following six trustees are retiring from the CPF Board in 2024, having faithfully served the two consecutive six-year terms allowed by the Canons: Canon Rosalie Simmonds Ballentine, Esq., DHL, the Rt. Rev. Diane M. Jardine Bruce, DMin, DD, Delbert C. Glover, PhD, Ryan K. Kusumoto, Canon Kathryn McCormick, and Solomon S. Owayda.

Report to the 81st General Convention

The Church Pension Fund Board of Trustees	
<p>Terms Ending in 2024:</p> <p>Canon Rosalie Simmonds Ballentine, Esq., DHL Vice Chair, The Church Pension Fund Board of Trustees Attorney, Law Office of Rosalie Simmonds Ballentine, PC St. Thomas, US Virgin Islands</p> <p>The Rt. Rev. Diane M. Jardine Bruce, DMin, DD Bishop Provisional, Episcopal Diocese of West Missouri Kansas City, Missouri</p> <p>The Very Rev. Samuel G. Candler* Dean, The Cathedral of Saint Philip Atlanta, Georgia</p> <p>The Rt. Rev. Clifton Daniel III* Dean, The Cathedral Church of Saint John the Divine (retired) Fort Lee, New Jersey</p> <p>Delbert C. Glover, PhD Vice President, DuPont (retired) Washington, DC</p> <p>The Rt. Rev. Julio Holguín* Bishop, Episcopal Diocese of the Dominican Republic (retired) Santo Domingo, Dominican Republic</p> <p>Ryan K. Kusumoto President and CEO Parents And Children Together Honolulu, Hawaii</p> <p>Canon Kathryn McCormick Chair, The Church Pension Fund Board of Trustees Canon for Administration & Finance, Episcopal Diocese of Mississippi (retired) Jackson, Mississippi</p> <p>Yvonne O’Neal* Social Justice Advocate Financial Consultant (retired) New York, New York</p> <p>Solomon S. Owayda Founding Partner, Mozaic Capital Advisors Boston, Massachusetts</p> <p>The Rev. Austin K. Rios (Bishop-Elect)* Rector, Saint Paul’s Within the Walls Convocation of Episcopal Churches in Europe Rome, Italy</p> <p>The Hon. Linda E. Watt* US Ambassador (retired) Former Chief Operating Officer. DFMS Raleigh, North Carolina</p>	<p>Terms Ending in 2027:</p> <p>The Rt. Rev. David A. Alvarez, PsyD Bishop, Episcopal Diocese of Puerto Rico (retired) Carolina, Puerto Rico</p> <p>The Rev. Brendan Barnicle, DMin Rector, St. Francis of Assisi Episcopal Church Wilsonville, Oregon</p> <p>The Rt. Rev. Ian T. Douglas, PhD Bishop, The Episcopal Church in Connecticut (retired) Vineyard Haven, Massachusetts</p> <p>The Rev. Amy Haynie Rector, Saint Nicholas’ Episcopal Church Midland, Texas</p> <p>The Very Rev. Cynthia Briggs Kittredge, ThD Dean and President/CEO, Seminary of the Southwest Austin, Texas</p> <p>The Rev. Dr. Gawain F. de Leeuw, DMin Vicar and Priest-in-Charge, Holy Trinity Church Inwood New York, New York</p> <p>John McCray-Goldsmith Managing Director, Wells Fargo Investment Portfolio San Francisco, California</p> <p>Sandra Ferguson McPhee, Esq. Attorney, Law Offices of Sandra Ferguson McPhee Kennebunk, Maine</p> <p>The Rt. Rev. Brian N. Prior, Vice Chair Vice Chair, The Church Pension Fund Board of Trustees Assisting Bishop, Episcopal Diocese of Alabama Assisting Bishop, Episcopal Diocese of Olympia Spokane Valley, Washington</p> <p>The Rt. Rev. Gregory H. Rickel Assisting Bishop, Episcopal Diocese of Southeast Florida Bishop of Olympia (resigned) Ft. Lauderdale, Florida</p> <p>Canon Anne M. Vickers Canon for Finance and Administration, Episcopal Diocese of Southwest Florida (retired) Tampa, Florida</p> <p>The Very Rev. Sandye A. Wilson Dean, The Cathedral Church of All Saints Episcopal Diocese of the Virgin Islands St. Thomas, US Virgin Islands</p> <p>Mary Katherine Wold, Esq. CEO and President The Church Pension Fund New York, New York</p>
<p><i>*Board members who are eligible for re-election in 2024</i></p>	

Responses to the General Convention

[Urge Adoption of a Uniform Paid Family Leave Policy \(2022-A003\)](#)³³

Resolved, That the 80th General Convention recognizes the difficulties that currently exist with the implementation of a paid family leave policy, given that there is currently no commercial insurance offering available, and therefore, urges all dioceses of the Church to adopt the proposed policy as soon as practicable, in order to be prepared to implement the policy as soon as a commercial insurance offering becomes available, whether through the Church Pension Group or other avenues; *and be it further...*

CPG appreciated the opportunity to support the work of the task force that proposed this resolution and will continue to monitor the market for paid family leave coverage. CPG also supports the Church's efforts to encourage employers to provide paid family leave to the clergy and lay employees who serve the Church.

[Establish Interim Body to Oversee the Continuing Development of Anti-Harassment Best Practices, Model Policy Examples, and Varied Training Materials \(2022-A066\)](#)³⁴

Resolved, That the Church Pension Group be asked to collaborate with this effort and to appoint a member to serve on the Task Force; *and be it further...*

CPG was glad to serve on the Task Force that was formed in response to this resolution and collaborate in this important work.

[Encourage Adoption of Ethical and Responsible Investment Programs \(2022-A073\)](#)³⁵

Resolved, that the 80th General Convention affirm to all institutional investors across the Church the value and importance of faithful and ethical investing (defined as investing institutional assets consistently with the Church's faith and teachings and the Church's mission) and responsible investing (defined as addressing, ethical concerns for social, environmental and governance matters, including climate change and human rights); *and be it further*

Resolved, that all institutional investors across The Episcopal Church be encouraged to adopt faithful and ethically responsible investing for their investment programs and portfolios and to manage their investment assets using the following elements of ethically responsible investing: ethical and theological guidelines for investment selection and management; shareholder engagement, including

voting proxies; and investing for responsible social and environmental outcomes as well as for financial return.

CPF takes pride in its investment practices as a fiduciary that has been called upon to care for the Church by providing comprehensive, cost-effective retirement, health, and life insurance benefits to its clergy and lay employees. Our socially responsible investing practices are further described at cpg.org/SRI.³⁶

[Divest from Fossil Fuel Companies and Invest in Renewable Energy \(2022-A089\)](#)³⁷

Resolved, That the 80th General Convention urge The Church Pension Fund (CPF) to be mindful of the Church's desire to become increasingly invested in renewable and clean energy; and be it further

Resolved, That the 80th General Convention request that The Church Pension Fund provide a report that includes a sustainability plan to the 81st General Convention; *and be it further...*

CPF continues to be mindful of the Church's desire to become increasingly invested in renewable and clean energy, and actively researches investment opportunities linked to sustainability and renewable/clean energy. Several recent investments of this type and other related work are described in the Sustainability Report that CPF is submitting in response to Resolution 2022-A089, which can be found at the end of this Blue Book Report.

[Conduct Historical Research on DFMS Assets Tied to Racial Injustice \(2022-A129\)](#)³⁸

Resolved, That this 80th General Convention urges the Church Pension Group to conduct historical research on the origins and sources of its financial and all other assets, and to report the results to its constituents; *and be it further...*

CPF is currently completing this important research and will offer a report on the results to its constituents and the Church in 2024.

[Establish a Shareholder Strategy to Address Carbon-Intensive Lending \(2022-Co16\)](#)³⁹

Resolved, That the 80th General Convention of The Episcopal Church direct the Executive Council (Domestic & Foreign Missionary Society aka DFMS) and its Committee on Corporate Social Responsibility (CCSR), in conjunction with The Church Pension Fund (CPF), to establish and coordinate shareholder strategy addressing Carbon-Intensive Lending by U.S. banks and other financial lending institutions; *and be it further*

Resolved, That the CCSR and CPF identify banks and financial lending institutions within the DFMS and CPF portfolios that are carbon-intensive lenders and initiate the appropriate shareholder strategy with these institutions to slow global warming; *and be it further...*

Information on CPF's work, alongside the CCSR, and how we use our collective voices as shareholders to encourage financial institutions to align their financing activities to achieve greenhouse gas emissions reduction targets, can be found in our Sustainability Report response to Resolution 2022-Ao8g at the end of this Blue Book Report.

[Urge Uniform Maternity Disability Coverage \(2022-Co65\)](#)⁴⁰

Resolved, That the 80th General Convention strongly recommends the Church Pension Group make available adequate 12-week coverage for lay and clergy employees through available marketplace policies.

In response to this resolution, CPG introduced a new short-term disability option that extended the benefit period for maternity disability coverage to 12 weeks, effective January 1, 2023. As of December 2023, approximately 18% of the employers offer short-term disability coverage have purchased the 12-week option.

[Create a Task Force on the Denominational Health Plan \(2022-Do34\)](#)⁴¹

Resolved, That there shall be a Task Force to Advise the Church on the Denominational Health Plan. The Task Force shall receive from the Episcopal Church Medical Trust annual reports for 2021, 2022, and 2023 about the status of the Denominational Health Plan, and a complete copy of all data sets held by the Medical Trust used to create said report; such data shall be appropriately anonymized to withhold personally identifying information and be suitable for review by a third-party actuary. The Task Force shall review the structure and offerings of the Denominational Health Plan, in consultation with the Church Pension Group staff, with special attention to the cost of premiums, and report back to the 81st General Convention a list of options to reduce health insurance costs across the church, including an examination of the impact of individual faith communities opting out of the

Denominational Health Plan, with a full explanation of the reasoning for and costs and benefits of each option. The 81st General Convention shall consider the options in deciding whether to modify the mandate given to the Denominational Health Plan in Resolution 2009-A177. The members of the Task Force shall be appointed by the Presiding Officers, and shall consist of: one member of the Church Pension Group Board of Trustees; one member of the Church Pension Group Client Council; one Church Pension Group staff member who is an expert in the health care issues addressed by the Denominational Health Plan; two members of Executive Council; two Bishops who serve as at-large members of the Task Force; four Clergy or Lay People who serve as at-large members of the Task Force; and two members who are experts in health care and insurance finance issues; *and be it further...*

CPG was pleased to participate in the work of this Task Force. The Chair of CPF's Board of Trustees and our Chief Operating Officer were actively engaged as members of this Task Force, supporting its work in preparation for the 81st General Convention. We look forward to the Blue Book Report of the Task Force and continuing our work to provide high-quality, cost-effective health benefits for the Church.

The Church Pension Fund Sustainability Report

Response to General Convention Resolution 2022-A089

At the 80th General Convention, Resolution A089, entitled “Resolution on Divestment & Just Transition,”⁴² urged The Church Pension Fund (CPF) to be mindful of the Church’s desire to become increasingly invested in renewable and clean energy and also requested that CPF provide a report that includes a sustainability plan to the 81st General Convention.

CPF has been investing directly in climate solutions since at least 2015 and continues to be mindful of the Church’s desire to become increasingly invested in renewable and clean energy. CPF has actively researched investment opportunities linked to sustainability and renewable/clean energy, which are described in the sustainability plan below.

CPF and its affiliated companies (CPG) are committed to corporate social responsibility, and that commitment serves as the foundation for its focus on sustainability. The faith and values of The Episcopal Church guide and inform all of CPG’s work. We recognize that CPF has been called upon to care for the Church by providing comprehensive, cost-effective retirement, health, and life insurance benefits to its clergy and lay employees. CPG gives expression to the priorities of the Church by supporting its social, ethical, and environmental values, while also remaining true to its fiduciary, regulatory, and other legal responsibilities.

This report will review CPG’s environmental sustainability efforts in response to General Convention Resolution 2022-A089. However, CPF also considers a broader definition of sustainability in the context of our work—specifically, what helps make CPF’s vision to provide the highest possible level of financial security in retirement to the people we serve, in a manner that is consistent with exemplary financial stewardship on our part and with the evolving needs of the Church, sustainable for the long term. This vision requires that CPF focus on a broad range of sustainability issues beyond the environment, such as diversity and inclusion, human rights, community engagement, corporate governance, and employee relations.

1. Corporate Values and Environmental Sustainability

As a business, we make meaningful efforts to support environmental sustainability, including:

- **LEED Gold Certification**—The corporate headquarters in New York has received LEED Gold certification for our implementation of environmentally sustainable practices in the construction and operation of our office.

- **Field Agent Transportation**—The agents for Church Insurance Agency Corporation receive higher transportation reimbursements when they use hybrid automobiles for business travel.
- **Sustainability in Responding to Insurance Claims**—In cases where buildings or appliances need to be replaced, we work with clients to encourage the application of LEED and Energy Star standards.
- **Electronic Statements and Communications**—We encourage the use of electronic publishing for benefit statements and communications. We work with our benefits partners to provide their benefits statements electronically and offer all communications, from the annual report to our pension plan guides, electronically.
- **Electronic Processing**—If possible, enrollments and account updates are processed electronically.
- **Green Publishing**—Church Publishing continues to work with its vendors to publish its print titles using green processes and sustainable paper sources. The growth of our electronic offerings has reduced the demand for print titles.
- **Facilities Management**—Through the efforts of employees and facilities management, we follow sustainable practices in running our office. Our efforts include using low-VOC paints and carpets, videoconferencing to replace travel, sustainable construction methods and furniture selection, energy-saving and recycled supplies, and recycling.

2. Investments and Environmental Sustainability

CPF's investment portfolio is managed to generate the returns needed to make benefit payments and meet financial obligations, which is typical for a mature pension fund. We believe we can be true to this primary responsibility while also supporting environmental sustainability objectives through a four-part socially responsible investing strategy:

- **Investing for Positive Impact:** proactively seeking out and investing with managers who deliver both strong returns and positive social impact.
- **Shareholder Engagement:** using CPF's position as an institutional investor to address corporate social responsibility of companies in the investment portfolio.
- **ESG Incorporation:** considering material environmental, social, and governance (ESG) issues as part of CPF's investment analysis and review.
- **Thought Leadership:** sharing CPF's experience and industry relationships to catalyze growth and advance best practices in socially responsible investing.

We discuss each of these topics below.

INVESTING FOR POSITIVE IMPACT

Consistent with Resolution 2022-A089, CPF is aware of the Church’s desire to actively invest in renewable energy. Its impact investment strategy directly responds to this desire. Since the last General Convention, CPF has made the following investments, which add to the number of clean energy investments already in its portfolio:

- \$30 million investment in Environmental Commodities Partners Capital. This investment fund invests in environmental commodities, which are designed to create a market and set a price for carbon emissions, such as carbon allowances, carbon offsets, and regional emission reduction credits. These commodities create costs for carbon emissions and incentives for using cleaner fuels, while supporting a regulatory framework to reduce emissions.
- \$25 million investment in New Energy Capital VI, which provides funding for mid-stage renewable energy projects. This investment fund meets the need for renewable energy project developers to obtain flexible financing and catalyzes growth in renewable energy.
- \$10 million investment in ArcTern Ventures Fund III, which invests in companies that provide carbon reduction solutions for high-emitting industries, such as electricity and energy, manufacturing, mobility, and food systems.

In addition to identifying, researching, and making these investments, CPF continues to research additional opportunities on an ongoing basis.

SHAREHOLDER ENGAGEMENT

CPF uses our voice as a shareholder to advance issues of environmental sustainability within the companies we own. The shareholder engagement process includes letters, dialogues, and, if necessary, the filing of shareholder resolutions to raise issues we believe to be important to CPF and the Church.

Historically, CPF has advocated for increased environmental disclosure from companies with high carbon emissions, believing that “what gets measured gets managed” and that more efficient management of resources leads to better investment results. While advocating for disclosure is still a component of the CPF strategy, recent efforts have been guided by General Convention Resolution 2022-Co16 (Climate Change—Carbon-Intensive Lending),⁴³ which requested

“That the 80th General Convention of The Episcopal Church direct the Executive Council (Domestic & Foreign Missionary Society, aka DFMS) and its Committee on Corporate Social Responsibility (CCSR), in conjunction with the Church Pension Fund (CPF), to establish and coordinate shareholder strategy addressing Carbon-Intensive Lending by U.S. Banks and other financial lending institutions.”

CPF works with CCSR and other investors to encourage financial institutions to issue reports disclosing a transition plan that describes how they intend to align financing activities with sectoral greenhouse gas emissions reduction targets, including the specific measures and policies to be implemented, reductions to be achieved by such measures and policies, and timelines for implementation and associated emission reductions. We believe that by requiring these companies to be explicit about their transition plans, investors can hold them accountable, and the targets are more likely to be achieved.

THOUGHT LEADERSHIP

CPF seeks to convene and connect investors, to advance best practices in socially responsible investing, and to increase the flow of capital into renewable and clean energy and other socially responsible investments. CPF has hosted in-person events and virtual *Insights & Ideas* webinars outlining best practices in responsible investment. These events have brought together industry leaders and stakeholders across the Church to advance our shared knowledge of the space.

Specific to environmental sustainability, since the last General Convention, CPG has hosted the following events:

- **Global Faith-Based Investors and the Climate Crisis:** Held during the United Nations Climate Week in 2023, this event focused on the role global faith-based investors can play in promoting solutions to address the climate crisis.
- **Sustainable Investing Landscape and Strategies:** This event highlighted key issues being raised in 2023, including how climate represents both a risk and an opportunity that investors need to consider carefully.
- **The ABCs of ESG:** This webinar sought to demystify the confusing terminology used by investors and explain how all investors can work with their financial partners to ensure environmental issues are properly considered in their investment portfolios.

Replays of some of these events can be found on CPG’s website at *Insights & Ideas*.⁴⁴

OTHER MATERIAL ENVIRONMENTAL SUSTAINABILITY INVESTMENT CONSIDERATIONS

The CPF investment team believes many environmental, social, and governance (ESG) issues present material opportunities and risks. As part of their normal investment analysis and review, CPF investment professionals work with current and prospective managers to more fully understand how the managers incorporate environmental issues into their investment decision-making.

Among the most material ESG issues, climate change presents significant opportunities and risks to investors. Significant capital will be flowing into climate change solutions, which could generate attractive returns. On the other hand, climate change may negatively impact some industries and investments, and companies need to manage the transition to a lower carbon economy. The CPF investment team has introduced climate change as a macroeconomic lens that will be considered in constructing a long-term investment portfolio. This lens can be applied to understanding what investment themes to pursue and how to evaluate the investment firms responsible for managing CPF's assets.

3. Collaboration Across the Church

In pursuing a socially responsible investment strategy, CPF works closely with CCSR to coordinate on shared priorities. We believe we can focus on meeting our fiduciary obligations while also supporting environmental sustainability. CPF has invested in renewable energy, advocated on issues of environmental sustainability and corporate social responsibility, collaborated and invested with other sustainable investors, and incorporated environmental considerations into its investment portfolio, taking into account our fiduciary responsibilities.

In doing so, we support the call for Stewardship of Creation, and the faith and values of The Episcopal Church are reflected in our work.

This material is provided for informational purposes only and should not be viewed as investment, tax, or other advice. It does not constitute a contract or an offer for any products or services. In the event of a conflict between this material and the official plan documents or insurance policies, any official plan documents or insurance policies will govern. The Church Pension Fund ("CPF") and its affiliates (collectively, "CPG") retain the right to amend, terminate, or modify the terms of any benefit plan and/or insurance policy described in this material at any time, for any reason, and, unless otherwise required by applicable law, without notice.

Endnotes

- ¹ The Church Pension Fund and Its Affiliates (CPG), cpg.org/global/about-us/overview
- ² The Church Pension Fund: Founding Documents, cpg.org/cpf-founding
- ³ The Church Pension Group: Three Lines of Business, <http://cpg.org/linesofbusiness>
- ⁴ The Church Pension Fund: Socially Responsible Investing, cpg.org/sri
- ⁵ 2023 CPG Annual Report, cpg.org/annualreport
- ⁶ Study Parity Between Lay and Clergy Pensions (Resolution 2018-A237), cpg.org/a237
- ⁷ Study Equity in Clergy and Lay Pension Plans (Resolution 2018-D045), cpg.org/2018d045
- ⁸ The Church Pension Fund Clergy Pension Plan (Clergy Pension Plan), cpg.org/cpp
- ⁹ The Episcopal Church Retirement Savings Plan (RSVP), cpg.org/rsvp
- ¹⁰ The International Clergy Pension Plan (ICPP), cpg.org/icpp
- ¹¹ The non-domestic dioceses of The Episcopal Church are Colombia, Cuba, Dominican Republic, Ecuador Central, Ecuador Litoral, Haiti, Honduras, Puerto Rico, Taiwan, Venezuela, and Virgin Islands (British only). The dioceses of the Iglesia Anglicana de la Región Central de América (IARCA) are Costa Rica, El Salvador, Guatemala, Nicaragua, and Panama.
- ¹² The Anglican Church of Mexico At-A-Glance, cpg.org/mexico-at-a-glance
- ¹³ The Diocese of Puerto Rico At-A-Glance, cpg.org/puertorico-at-a-glance
- ¹⁴ The Episcopal Church Lay Employees' Retirement Plan (Lay DB Plan), cpg.org/laydbplan
- ¹⁵ The Episcopal Church Lay Employees' Defined Contribution Plan (Lay DC Plan), cpg.org/laydcplan
- ¹⁶ CPG Online Learning Center, cpg.org/lay-elearning
- ¹⁷ International Support: See the link at the top of the cpg.org landing page, cpg.org
- ¹⁸ Cost-of-Living Adjustment (COLA), cpg.org/COLA
- ¹⁹ CPF currently offers a post-retirement health subsidy to eligible clergy and spouses. However, CPF is required to maintain sufficient liquidity and assets to pay its pension and other benefit plan obligations. Given uncertain financial markets and their impact on assets, CPF has reserved the right, at its discretion, to modify or discontinue the post-retirement health subsidy at any time.
- ²⁰ The Fund for Special Assistance: See *A Guide to Clergy Benefits*, cpg.org/cppguide, and *A Guide to International Clergy Benefits*, cpg.org/icppguide
- ²¹ The Fund for Medical Assistance, cpg.org/fma
- ²² The Denominational Health Plan, cpg.org/dhp
- ²³ The Episcopal Church Medical Trust average annual increases: Custom comparison includes companies from charities and nonprofit, higher education sectors.

- ²⁴ CPG Group Medicare Advantage (PPO) Plan, cpg.org/group-medicare-advantage
- ²⁵ The Church Insurance Companies, cpg.org/cic
- ²⁶ The Church Insurance Companies: [Risk Management Programs and Resources](#)
- ²⁷ The Church Insurance Companies: [Disaster Preparedness](#)
- ²⁸ The Church Insurance Companies: [Why Insurance Premiums Are Increasing](#)
- ²⁹ Church Publishing Incorporated, cpg.org/cpi
- ³⁰ Video: [Michael Hood](#), Chief Investment Officer of The Church Pension Fund
- ³¹ Trends in Ministry: Insights into Episcopal Clergy, cpg.org/research
- ³² Lay Employment and Compensation Report: A Demographic Analysis of Lay Employees in The Church Pension Fund’s Retirement Plans, cpg.org/layjobreport
- ³³ Response to the General Convention: [Urge Adoption of a Uniform Paid Family Leave Policy \(2022-A003\)](#)
- ³⁴ Response to the General Convention: [Establish Interim Body to Oversee the Continuing Development of Anti-Harassment Best Practices, Model Policy Examples, and Varied Training Materials \(2022-A066\)](#)
- ³⁵ Response to the General Convention: [Encourage Adoption of Ethical and Responsible Investment Programs \(2022-A073\)](#)
- ³⁶ The Church Pension Fund: Socially Responsible Investing, cpg.org/sri
- ³⁷ Response to the General Convention: [Divest from Fossil Fuel Companies and Invest in Renewable Energy \(2022-A089\)](#)
- ³⁸ Response to the General Convention: [Conduct Historical Research on DFMS Assets Tied to Racial Injustice \(2022-A129\)](#)
- ³⁹ Response to the General Convention: [Establish a Shareholder Strategy to Address Carbon-Intensive Lending \(2022-C016\)](#)
- ⁴⁰ Response to the General Convention: [Urge Uniform Maternity Disability Coverage \(2022-C065\)](#)
- ⁴¹ Response to the General Convention: [Create a Task Force on the Denominational Health Plan \(2022-D034\)](#)
- ⁴² Resolution 2022-A089, “Resolution on Divestment & Just Transition,” 2022.vbinder.net/resolutions/89?house=HD&lang=en
- ⁴³ Resolution 2022-C016, “Climate Change - Carbon-Intensive Lending,” <https://2022.vbinder.net/resolutions/129?house=HD&lang=en>
- ⁴⁴ The Church Pension Group: [Insights & Ideas](#)

COURT OF REVIEW

Membership

Ms. Laura Russell, President	Lay	Newark, II	2024
Ms. Sharon Henes, Vice President	Lay	Milwaukee, V	2024
The Rev. Canon Lisa S. Burns	Priest	Texas, VII	2024
Dr. L. Zoe Cole	Lay	Colorado, VI	2024
The Rev. Rodney Davis	Priest	Northern California, VIII	2024
Dr. Delbert C. Glover	Lay	Washington, III	2024
The Rev Canon Dorothy d'Rue Hazel	Deacon	Upper South Carolina, IV	2024
The Rt Rev A. Robert Hirschfeld	Bishop	New Hampshire, I	2024
The Rev Deacon Lisa Kirby	Deacon	East Carolina, IV	2024
The Rt Rev Phoebe A. Roaf	Bishop	West Tennessee, IV	2024
Sra. Grecia Reynoso	Lay	Dominican Republic, IX	2024
Ms. Brunilda Rodríguez	Lay	Puerto Rico, II	2024
The Rt. Rev Kathryn Ryan	Bishop	Texas, VII	2024
The Rev Christopher Wendell	Priest	Massachusetts, I	2024
The Rt Rev Frank S. Logue	Bishop, Alt	Georgia, IV	2024
The Rev Canon Gregory A. Jacobs	Priest, Alt	Newark, II	2024

Change in Membership

The Rev. Canon Carrie Schofield-Broadbent resigned on May 12, 2023, upon receiving consents to her election as Bishop of Maryland.

Canon Julie Dean Larson died on September 11, 2023.

The Court requested these positions be filed several times, but no appointments were made.

Acknowledgements

The Court of Review began the matter of the objections filed to the Election of a Bishop Coadjutor of the Diocese of Florida (May 2022 Election) prior to the election of members of the Court of Review at the General Convention in July 2022, therefore, the prior membership of the Court of Review continued work on the matter. The Court of Review would like to recognize the following individuals for their work on this matter: Ms. Laura A. Russell, Mr. Julian M. Bivins, Jr., Ms. Valentia Clopton, Ms. Sharon Henes, The Rt. Rev. Carlye Hughes, The Rev. Lisa Kirby, The Rev Gayle McCarty, The Rt. Rev Jose McLoughlin, The Rev. Tracie Middleton, The Rt. Rev Gretchen Rehberg, The Rev. Canon Brian

Ried, Ms. Brunilda Rodriguez Velez, Hon. William Vodrey, The Rev Chris Wendell, and The Ven. Chip Whitacre.

We would like to thank the Court of Review's legal advisors: Diane E. Sammons, Esq. and Scott Remington, Esq.

Representation at General Convention

Deputy Laura Russell is authorized to receive non-substantive amendments to this report.

Mandate

Canon IV.5.4

There shall be a court known as the Court of Review, with jurisdiction to receive and determine appeals from Hearing Panels of Dioceses as provided in Canon IV.15 and to determine venue issues as provided in Canon IV 19.5.c.

- a.** The Court of Review consists of: i. Three Bishops; six Members of the Clergy, who must include at least two Priests and at least two Deacons; and six lay persons; and ii. one Bishop, one Priest or Deacon, and one lay person to serve as alternates as provided in this Section.
- b.** The Joint Standing Committee on Nominations will nominate a slate of Clergy and lay persons for election to the Court of Review, in accordance with the Joint Standing Committee on Nominations' canonical charge and procedures and guided by the skill sets needed for effective service on the Court of Review. The Joint Standing Committee on Nominations may, but need not, nominate more persons than there are vacancies. The Clergy and lay nominees for the Court of Review may, but need not, be Deputies to General Convention. The Joint Standing Committee on Nominations must create a description of the skills, gifts, and experience requisite for service on the Court of Review, after consultation with the Court, including the value of cultural and geographic diversity on the Court and the value of including historically underrepresented voices in the governance of the Church.
- c.** The Bishop members and Bishop alternate members on the Court of Review will be nominated by the Presiding Bishop after consultation with the Joint Standing Committee on Nominations, and then elected by the House of Bishops at a regular meeting of the General Convention.
- d.** The Clergy and lay members and alternates on the Court of Review will be elected by the House of Deputies at a regular meeting of the General Convention.

1. Except for a member filling a vacancy, the term of office of a member of the Court of Review begins at the adjournment of the regular meeting of the General Convention at which the member was elected and expires on the adjournment of the second regular meeting of the General Convention following.

2. Members of the Court of Review will serve staggered terms of office such that the terms of half of the members expire at each regular meeting of the General Convention. The Joint Standing Committee on Nominations must make its nominations in a manner that supports this staggering of terms.

3. Any member who has served 12 or more consecutive years will be ineligible for reelection to the Court of Review until the next regular meeting of the General Convention following the one at which the member was ineligible for reelection to the Court of Review. A person's service as an alternate will not count against these term limitations.

e. The Court of Review must select a President from among its members. The President must be a Priest, Deacon, or lay person.

f. The persons appointed to the Court of Review will continue to serve until their respective successors have been elected, except in case of death, resignation, or declination to serve. Members of the Court of Review who are currently appointed to a Panel will continue to serve until the Panel has completed its work.

g. Whenever a matter is referred to the Court of Review, the President must appoint a Panel for that case consisting of one Bishop, two Members of the Clergy, and two lay persons. No Bishop or Clergy member of the Court of Review may serve in any matter originating from the Diocese in which such Bishop or Clergy member is canonically resident or is then currently licensed to serve, and no lay member may serve in a matter originating from the Diocese of the lay member's primary residence or a Diocese in which the lay member is then currently active. In such event, the President shall appoint another member of the Court from the same Order to serve; if no other member is available to serve the President must appoint an alternate of the same Order to serve.

h. If any member of the Court of Review is excused under Canon IV.5.3.c, or, upon objection made by either party to the appeal, is found by the other members of the Court of Review to be disqualified, an alternate shall serve.

i. In the event of any Court of Review member's death, resignation, or declination to serve, or disability rendering the member unable to act, and in the further event that no other member of the Court is available to serve, the President of the Court of Review must declare a vacancy on the Court of Review. Notices of resignation or declination to serve must be communicated in writing to the President of the Court of Review.

- j.** Vacancies on the Court of Review must be filled by the President of the House of Deputies for lay and Clergy members and by the Presiding Bishop for Bishop members.
- k.** The Court of Review must appoint a clerk who may be a member of the Court, who will be custodian of all records and files of the Court of Review, and who will provide administrative services as needed for the functioning of the Court.
- l.** The rules of procedure for appeals to the Court of Review are as provided in Canon IV.15, but the Court of Review may adopt, alter, or rescind supplemental rules of procedure not inconsistent with the Constitution and Canons of the Church.
- m.** For good cause shown, the Court of Review may extend any deadline in this Title pertaining to the Court of Review except the time to file a notice of appeal.

Canon III.11.8

- a.** Within ten days after the election of a Bishop Diocesan, a Bishop Coadjutor, or a Bishop Suffragan by a Diocesan Convention, delegates constituting no less than ten percent of the number of delegates casting votes on the final ballot may file with the Secretary of the Convention written objections to the election process, setting forth in detail all alleged irregularities. Within ten days after receipt thereof, the Secretary of the Convention shall forward copies of the same to the Bishop Diocesan, the Chancellor and Standing Committee of the Diocese, and to the Presiding Bishop, who shall request the Court of Review to investigate the complaint. The Court of Review may invite response by the Bishop Diocesan, the Chancellor, the Standing Committee and any other persons within the Diocese for which the Bishop was elected. Within 45 days after receipt of the request, the Court of Review shall send a written report of its findings to the Presiding Bishop, a copy of which report the Presiding Bishop, within fifteen days, shall cause to be sent to the Bisop Diocesan, the Chancellor, the Standing Committee and the Secretary of the Convention of the electing Diocese. The Secretary shall send a copy of the report to each of the delegates who filed objection to the election process.
- b.** The report of the Court of Review shall be sent to the Standing Committees of the several Dioceses, with the Certificate of the Secretary of the electing Convention relating to consent to ordain. Likewise, the Presiding Bishop shall include the report in the communication to the Bishops exercising jurisdiction. The 120 day period for Standing Committees and Bishops to consent to the election begins with these communications.

Summary of Work

The Court of Review held training sessions on December 21, 2022, June 1, 2023, and November 6-8, 2023.

The Court of Review held several meetings related to the individual matters before it.

As the work of the Court of Review began, the matter concerning the Election of a Bishop Coadjutor of the Diocese of Florida (May 2022 Election) was already underway. The prior Court of Review investigated and deliberated on the matter. The Court of Review issued a report on August 2, 2022 which made the following findings:

- The Convention did not achieve a quorum in the clergy order as required by the diocese's governing documents, Robert's Rules of Order and Florida law and was unable to conduct business.
- The irregularities in the Convention process itself cast a shadow over the legitimacy of the election.
- The action of the Diocese in changing its manner of voting two days prior to the election was fundamentally unfair to the Delegates of the Convention and the candidates who relied on the April 7, 2022 notice in preparation for the election.

On August 19, 2022, the candidate securing the most votes withdrew his acceptance of the election result and the Diocese of Florida chose to move forward with a second election.

The Court of Review received the Letter of Objection, dated November 28, 2022, concerning the Election of a Bishop Coadjutor of the Diocese of Florida (September 2022 Election). The Court of Review investigated and deliberated on the matter. The Court of Review issued a report on January 31, 2022 which made the following findings on the five principal allegations of the Objectors:

- The reasons for the discrepancies regarding the number of clergy participants noted by the Objectors to be clearly understood, harmless, and not indicative of any material errors in the vote count.
- Multiple clergy who were otherwise entitled to vote in the election were denied that right due to disparate treatment in the granting of canonical residence. This action constituted an irregularity in the election process which could have affected the outcome of the vote in the clergy order. Furthermore, the interviews suggest a pattern and practice of LGBTQ+ clergy and those who opposed the Bishop's stated views not being treated equally with similarly situated clergy in the securing and exercising of their rights to ordination, licensing and the granting of canonical residency. These apparent actions may also have contributed to and influenced the determination of which clergy were deemed eligible to vote at the Second Special Election

Convention and, accordingly, its results. These findings cast doubt on the integrity of the election process.

- In the denial of duly selected lay delegates from having seat, voice and vote at the November Special Election, the Diocese was not in compliance with the Diocesan Articles of Reincorporation, the Diocesan Canons and its own Second Special Convention Rules of Order. Moreover, the Diocesan process utilized for the appointment of new delegates for those unable to attend the Second Special Electing Convention was irregular and not in conformity with Diocesan Canons. Additionally, the change in the Diocesan procedures for selecting delegates only a month before the special convention was fundamentally unfair to parishes and to all who relied on this established process. Any disenfranchisement of duly selected delegates creates a doubt as to the integrity of an election. The Court cannot state conclusively whether the addition of these delegates would have changed the outcome of the election; it can state that this disenfranchisement casts a shadow over the election process.
- The failure of the Diocese to achieve its stated goal to have a bishop coadjutor in place by November 5, 2022 did not constitute an irregularity in the election process. Additionally, Resolution 2021-001 did not call for a new profile nor an update of the candidate's profile.
- Although it is not prudent to have a bishop-elect come on staff while an objection to the election is under review or remain on staff when he or she is a candidate in a second election necessitated by an objection to the first election, the Court of Review cannot conclude whether this position gave the asserted candidate-elect any material advantage in the second election.

The candidate-elect failed to receive a majority of consents from the diocesan bishops and diocesan standing committees by July 22, 2022.

The Court of Review is currently in the process of deliberating on a Title IV appeal.

The Court also reviewed the Canons of the Episcopal Church and discussed potential amendments to better assist our work, and further clarify the role of the Court of Review and prepared resolutions to achieve those purposes.

Proposed Resolutions

A103 Amend Canon III.11.8

That Canon III.11.8 is hereby amended to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

III.11.8

a. Within ten days after the election of a Bishop Diocesan, a Bishop Coadjutor, or a Bishop Suffragan by a Diocesan Convention, delegates constituting no less than ten percent of the number of delegates casting votes on the final ballot may file with the Secretary of the Convention written objections to the election process, setting forth in detail all alleged irregularities. Within ten days after receipt thereof, the Secretary of the Convention shall forward copies of the same to the Bishop Diocesan, the Chancellor and Standing Committee of the Diocese, and to the Presiding Bishop, who shall request the Court of Review to investigate the complaint. At its sole discretion, the Court may use an investigator of its choosing. The Court of Review may invite response by the Bishop Diocesan, the Chancellor, the Standing Committee and any other persons within the Diocese for which the Bishop was elected. The Court may provide for a pastoral response to any affected parties, as it deems appropriate. Within 45 60 days after receipt of the request, the Court of Review shall send a written report of its findings to the Presiding Bishop, a copy of which report the Presiding Bishop, within fifteen days, shall cause to be sent to the Bishop Diocesan, the Chancellor, the Standing Committee and the Secretary of the Convention of the electing Diocese. The Secretary shall send a copy of the report to each of the delegates who filed objection to the election process.

b. The report of the Court of Review shall be sent to the Standing Committees of the several Dioceses, with the Certificate of the Secretary of the electing Convention relating to consent to ordain. Likewise, the Presiding Bishop shall include the report in the communication to the Bishops exercising jurisdiction. The 120 day period for Standing Committees and Bishops to consent to the election begins with these communications.

<Proposed amended resolution text showing exact changes being made:>

III.11.8

a. Within ten days after the election of a Bishop Diocesan, a Bishop Coadjutor, or a Bishop Suffragan by a Diocesan Convention, delegates constituting no less than ten percent of the number of delegates casting votes on the final ballot may file with the Secretary of the Convention written objections to the election process, setting forth in detail all alleged irregularities. Within ten days after receipt thereof, the Secretary of the Convention shall forward copies of the same to the Bishop Diocesan, the Chancellor and Standing Committee of the Diocese, and to the Presiding Bishop, who shall request the Court of Review to investigate the complaint. *At its sole discretion, the Court may use an investigator of its choosing.* The Court of Review may invite response by the Bishop Diocesan, the Chancellor, the Standing Committee and any other persons within the Diocese for which the Bishop was elected. *The Court may provide for a pastoral response to any affected parties, as it deems appropriate.* Within ~~45~~ 60 days after receipt of the request, the Court of Review shall send a written report of its findings to the Presiding Bishop, a copy of which report the Presiding Bishop, within fifteen days, shall cause to be sent to the Bishop Diocesan, the Chancellor, the Standing Committee and the Secretary of the Convention of the electing Diocese. The Secretary shall send a copy of the report to each of the delegates who filed objection to the election process.

b. The report of the Court of Review shall be sent to the Standing Committees of the several Dioceses, with the Certificate of the Secretary of the electing Convention relating to consent to ordain. Likewise, the Presiding Bishop shall include the report in the communication to the Bishops exercising jurisdiction. The 120 day period for Standing Committees and Bishops to consent to the election begins with these communications.

EXPLANATION

This proposed amendment makes three changes to the work of the Court of Review in conducting investigations when an episcopal election is challenged by members of an electing convention. Since its inception, the Court of Review has conducted three episcopal election investigations pursuant to Title III. In each matter, the time frame needed to complete the necessary investigation and finalize the report was difficult to meet. The first change empowers the Court of Review to use an investigator of its own choosing to help it more expeditiously and professionally complete its work. The second change increases to 60 days the time period for completing the required work. The third change authorizes the Court to provide for pastoral response to parties impacted by its investigation. At present, no one within The Episcopal Church is canonically empowered to provide such pastoral care, and, given the nature of these proceedings, it may well be impossible and/or inappropriate for either the electing Diocese or members of the Court itself to provide such pastoral care. This change would enable the Court to make provision for such pastoral care to parties affected by its Title III work.

A104 Amend Canon IV.6.9

That Canon IV.6.9 is hereby amended to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

IV.6.9.

Absent extraordinary circumstances, and notwithstanding any other provision of this Title, all matters reported to an Intake Officer shall reach final, non-appellate, resolution within 15 months of the initial Intake Report date. The Reference Panel shall monitor the progress of each referral on a monthly basis to ensure that the matter is progressing in a timely fashion. Until such time as the matter is referred to a Hearing Panel, if the Reference Panel determines that the matter has reached an impasse or is not progressing in a timely fashion, it may re-refer the matter. The Intake Officer shall report at least monthly to the Respondent, the Respondent's Advisor, the Respondent's Counsel, if any, the Complainant, the Complainant's Advisor and the Complainant's Counsel, if any, on the progress in the matter. The President of the Disciplinary Board, following consultation with the relevant panels, may, in their sole discretion, reasonably adjust any time periods specified in this title related to matters before panels, for the purposes of ensuring timely progress.

<Proposed amended resolution text showing exact changes being made:>

IV.6.9.

Absent extraordinary circumstances, and notwithstanding any other provision of this Title, all matters reported to an Intake Officer shall reach final, non-appellate, resolution within 15 months of the initial Intake Report date. The Reference Panel shall monitor the progress of each referral on a monthly basis to ensure that the matter is progressing in a timely fashion. Until such time as the matter is referred to a Hearing Panel, if the Reference Panel determines that the matter has reached an impasse or is not progressing in a timely fashion, it may re-refer the matter. ~~Once a matter is referred to a Hearing Panel, Canon IV.15.1 shall govern any issue regarding the progress of the matter.~~ The Intake Officer shall report at least monthly to the Respondent, the Respondent's Advisor, the Respondent's Counsel, if any, the Complainant, the Complainant's Advisor and the Complainant's Counsel, if any, on the progress in the matter. The President of the Disciplinary Board, following consultation with the relevant panels, may, in their sole discretion, reasonably adjust any time periods specified in this title related to matters before panels, for the purposes of ensuring timely progress.

EXPLANATION

One of the persistent concerns the Court of Review has heard from the church since its inception, is the length of time it takes Title IV matters to progress from Intake to final resolution. In many cases, the longer a matter is pending, the greater the harm experienced by potentially injured parties, affected communities, complainants, and dioceses. Further, it has been the repeated experience of Hearing Panels conducted in The Episcopal Church that process delay has become an intentional procedural tactic employed by various participants. While the canons provide specific opportunities to limit delay at some later stages of the process, even those tools are often ineffective in the face of extensive discovery and motion arguments, continuance requests, scheduling conflicts, and other sources of delay. This amendment would attempt to reduce overall process length by prioritizing the needs of injured parties, affected communities, complainants, and Dioceses, by setting an overall time limit of 15 months from the date of the initial written Intake Report within which Title IV matters must reach final adjudication, absent extraordinary circumstances (such as, for example, pending criminal trials). It would also empower the President of the Disciplinary Board, after consultation with the relevant panel, to adjust any time periods prescribed by Title IV at various stages of panel consideration to accomplish this objective. This approach helps our disciplinary process better balance the overall objectives of Title IV and the needs of all the various parties.

A105 Amend Canon IV.5.4.g

That Canon IV.15.4.g is hereby amended to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

IV.5.4.g

g. Whenever a matter is referred to the Court of Review, the President must appoint a Panel for that case consisting of one Bishop, two Members of the Clergy, and two lay persons. No Bishop or Clergy member of the Court of Review may serve in any matter originating from the Diocese in which such Bishop or Clergy member is canonically resident or is then currently licensed to serve, and no lay member may serve in a matter originating from the Diocese of the lay member's primary residence or a Diocese in which the lay member is then currently active. In such event, the President shall appoint another member of the Court from the same Order to serve; if no other member is available to serve, the President must appoint an alternate of the same Order to serve.

<Proposed amended resolution text showing exact changes being made:>

IV.5.4.g

~~g. Whenever a matter is referred to the Court of Review, the President must appoint a Panel for that case consisting of one Bishop, two Members of the Clergy, and two lay persons. No Bishop or Clergy member of the Court of Review may serve in any matter originating from the Diocese in which such Bishop or Clergy member is canonically resident or is then currently licensed to serve, and no lay member may serve in a matter originating from the Diocese of the lay member's primary residence or a Diocese in which the lay member is then currently active. In such event, the President shall appoint another member of the Court from the same Order to serve; if no other member is available to serve, the President must appoint an alternate of the same Order to serve.~~

EXPLANATION

The provisions stricken from this section may have been left inadvertently when Title IV was amended to remove the Provincial Courts of Review. In any case, there is no benefit or reason to designate panels within the Court of Review. Moreover, it is already difficult enough for the Joint Nominating Committee to recommend slates of candidates who have the requisite “skills, gifts, and experience” the Court needs, while also representing the cultural and geographic diversity of the church, including historically underrepresented voices. To create a subset of the Court which still contained this diversity would be both impossible and create a hardship for some members of the Court.

A106 Amend Canon IV.15.5.a

That Canon IV.15.5.a is hereby amended to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (*****) to see the version showing all deleted and added text.>

Sec. 5. The standards for and conditions of appeal to the Court of Review shall be as follows:

- a.** Where an Order is issued against a Respondent who fails to appear before the Hearing Panel or who otherwise fails to participate in proceedings before the Hearing Panel, such Order shall be upheld unless a review of the record on appeal shows the Hearing Panel made a clear error in issuing such Order, which substantially prejudiced the Respondent. The Court of Review shall review the facts and record in the light most favorable to the Respondent.

<Proposed amended resolution text showing exact changes being made:>

Sec. 5. The standards for and conditions of appeal to the Court of Review shall be as follows:

- a. Where an Order is issued against a Respondent who fails to appear before the Hearing Panel or who otherwise fails to participate in proceedings before the Hearing Panel, such Order shall be upheld unless a review of the record on appeal shows the Hearing Panel made a clear error in issuing such Order, *which substantially prejudiced the Respondent*. The Court of Review shall review the facts and record in the light most favorable to the Respondent.

EXPLANATION

When a Respondent chooses not to participate in proceedings or appear for hearing, they necessarily forfeit certain options to subsequently challenge a hearing panel's order. This is particularly the case since Title IV proceedings are neither civil nor criminal in nature, but ecclesiastical. Ordained persons who chose not to participate or appear in a Title IV proceeding against them have expressed in such actions a profound disregard for the life and health of the Body of Christ. Such disregard in itself, absent any allegations of misconduct, suggests unfitness for ordained ministry. Not all avenues of appeal which are open to Respondents who participate in the proceedings and in the hearing should be available to a Respondent who had intentionally chosen not to participate. It appears that the language of "clear error" is intended to parallel the secular appellate review standard set out in *U.S. v. Gypsum*, 333 U.S. 364 (1948) for questions of fact that leave the reviewing court "with the clear impression that a mistake has been committed" in the issuance of a hearing panel order. However, the Court of Review is concerned that without the proposed clarifying language, it could too persuasively be argued that an error which was clear but did not prejudice the Respondent could provide a basis for a Respondent bent on delaying final resolution of a matter to do so to the prejudice of the process, complainants, and the Church. The suggested language assures that the reviewing court retains the ability to set aside orders which are mistaken, while retaining the ability to bring closure where appropriate.

A107 Amend Canon IV.19.12

That Canon IV.19.12 is hereby amended to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Sec. 12. In all proceedings under this Title whenever a Respondent or a Complainant is required or permitted to appear or to participate or to be heard or to be present, they each shall have the right to be accompanied by and to be represented by counsel of their choice. Counsel representing respondents may not withdraw from their representation without both providing notice to the Respondent and the Church Attorney, and receiving permission to withdraw from the Panel to whom the matter is currently referred. Respondent shall be permitted the opportunity to be heard concerning the withdrawal of counsel. Notwithstanding Respondent's right to be accompanied by and represented by counsel of their choice, any counsel determined to have previously withdrawn from representation without permission of the relevant Panel shall not be eligible to represent respondents in Title IV matters within The Episcopal Church. Whenever any notice or other document is provided to or served upon a Respondent or a Complainant under this Title, such shall also simultaneously be provided to or served upon their respective counsel, if Respondent or Complainant, as the case may be, has notified the Bishop of the identity and contact information for such counsel. Nothing in this Title shall be construed as requiring any Respondent to be represented by counsel. Anything in this Title required or permitted to be done by the Respondent's counsel may be done by the Respondent personally.

<Proposed amended resolution text showing exact changes being made:>

Sec. 12. In all proceedings under this Title whenever a Respondent or a Complainant is required or permitted to appear or to participate or to be heard or to be present, they each shall have the right to be accompanied by and to be represented by counsel of their choice. *Counsel representing respondents may not withdraw from their representation without both providing notice to the Respondent and the Church Attorney, and receiving permission to withdraw from the Panel to whom the matter is currently referred. Respondent shall be permitted the opportunity to be heard concerning the withdrawal of counsel. Notwithstanding Respondent's right to be accompanied by and represented by counsel of their choice, any counsel determined to have previously withdrawn from representation without permission of the relevant Panel shall not be eligible to represent respondents in Title IV matters within The Episcopal Church.* Whenever any notice or other document is provided to or served upon a Respondent or a Complainant under this Title, such shall also simultaneously be provided to or served upon their respective counsel, if Respondent or Complainant, as the case may be, has notified the Bishop of the identity and contact information for such counsel. Nothing in this Title shall be construed as requiring any Respondent to be represented by counsel. Anything in this Title required or permitted to be done by the Respondent's counsel may be done by the Respondent personally.

EXPLANATION

While Respondents are not required to be represented by counsel at any point in Title IV matters, those who choose to be so represented have a reasonable expectation that they will be well-served by their counsel. In recent years, the unanticipated withdrawal of counsel chosen by respondents has created significant hardship in the administration of Title IV matters. Unlike in the practice of secular law, where ethically concerning behavior by attorneys is subject to professional discipline, The Episcopal Church's clergy disciplinary process lacks any way of enforcing sanctions upon attorneys once they are no longer representing participants in a Title IV process. This resolution amends the canons to bar from any future representation of respondents an attorney who withdraws from representing a Respondent without permission of the relevant Panel. This will provide the strongest possible protections the canons can offer to protect respondents from being abandoned by their attorneys, and to protect injured parties and other affected individuals and communities from the potential delays in final adjudication associated with unanticipated or untimely attorney withdrawals.

COURT OF REVIEW FOR BISHOPS

Members

The Rt. Rev. Laura Ahrens	Connecticut, I	2024
The Rt. Rev. J. Scott Barker	Nebraska, VI	2030
The Rt. Rev. John Bauerschmidt	Tennessee, IV	2030
The Rt. Rev. Gregory O. Brewer	Central Florida, IV	2027
The Rt. Rev. Matthew A. Gunter	Fond du Lac, V	2027
The Rt. Rev. Stephen Lane	Maine, I	2024
The Rt. Rev. Audrey Scanlan	Central Pennsylvania, III	2027
The Rt. Rev. Susan Brown Snook	San Diego, VIII	2030
The Rt. Rev. Terry White	Kentucky, IV	2024

Mandate

2022 - Canon IV.17.8

Sec. 8. The Court of Review for Bishops is hereby established as a court of the Church to have jurisdiction over appeals from Hearing Panels of the Disciplinary Board for Bishops.

- a.** The Court of Review for Bishops consists of nine members, all of whom must be Bishops. Three Bishops will be elected by the House of Bishops at any regularly scheduled meeting of the House of Bishops, to serve until the adjournment of the third succeeding regular meeting of General Convention and until their successors are elected and qualify; but there shall be no change in the composition of the Court with respect to a particular Respondent following any hearing in the matter and while it is pending unresolved before the Court.
- b.** The Presiding Bishop must fill any vacancies on the Court of Review for Bishops.
- c.** From among their number, the members of the Court of Review for Bishops must elect a president.
- d.** The reasonable and necessary expenses of the Court of Review for Bishops, including fees, costs, disbursements, and expenses of the members, clerks, reporters, and Church Attorneys, will be charged upon the General Convention and paid by the Treasurer of the General Convention upon Order of the president of the Court of Review. The Court of Review for Bishops has the authority to contract for and bind the General Convention to pay these expenses.

Summary of Work

The Court of Review for Bishops did not meet between the 80th and 81st General Conventions.

DISCIPLINARY BOARD FOR BISHOPS

Members

The Rt. Rev. Chilton Knudsen, Chair	Maryland, III	2027
The Hon. A. Joseph Alarid	Rio Grande, VII	2024
The Rt. Rev. Mark Bourlakas	Southwestern Virginia, III	2024
The Rt. Rev. Jennifer Brooke-Davidson	North Carolina, IV	2024
Canon Julie Dean Larsen	Los Angeles, VIII	2027
Mr. William Fleener, Jr.	Western Michigan, V	2027
The Rt. Rev. Wendell Gibbs	Michigan, V	2024
The Rt. Rev. Dena Harrison	Texas, VII	2024
The Rt. Rev. Susan Haynes	Southern Virginia, III	2027
The Rt. Rev. A. Robert Hirschfeld	New Hampshire, I	2024
The Rt. Rev. Michael C.B. Hunn	Rio Grande, VII	2027
The Rev. Canon Gregory Jacobs	Newark, II	2027
The Rt. Rev. W. Nicholas Knisely	Rhode Island, I	2024
The Rev. Mally Ewing Lloyd	Massachusetts, I	2024
The Rt. Rev. Kevin Nichols	Bethlehem, III	2027
Melissa Perrin	Chicago, V	2024
The Rev. Irene Tanabe	Olympia, VIII	2024
The Rev. Chris Wendell	Massachusetts, I	2027

Changes in Membership

Canon Julie Dean Larsen of Los Angeles died of cancer In November 2023. We have asked twice for PHoD/Executive Council to appoint a new member to take Julie’s place.

Representation at General Convention

Bishop Knudsen and Bishop Nichols are authorized to receive non-substantive amendments to this report at the General Convention.

Mandate

Canon IV.17.3-5

Sec. 3.

The Disciplinary Board for Bishops is hereby established as a court of the Church to have original jurisdiction over matters of discipline of Bishops, to hear Bishops' appeals from imposition of restriction on ministry or placement on Administrative Leave and to determine venue issues as provided in Canon IV.19.5. The Disciplinary Board for Bishops shall consist of ten (10) Bishops elected by the House of Bishops at a regularly scheduled session of General Convention, and four (4) Priests or Deacons and four (4) lay persons elected by the House of Deputies. All lay persons elected or appointed to serve shall be confirmed adult communicants in good standing. Members of the Board shall serve staggered terms of six (6) years, with terms of one half of the Bishops and one half of the lay persons, Priests and Deacons collectively expiring every three (3) years.

A vacancy among the member Bishops shall be appointed by the Presiding Bishop with the advice and consent of the Bishop members of Executive Council. A vacancy among the lay or Priest or Deacon members shall be filled by the President of the House of Deputies with the advice and consent of the lay, Priest and Deacon members of Executive Council. Unless elected or appointed to fill the remainder of an unexpired term, each member shall serve from the first day of January following the adjournment of the General Convention at which the member was elected, until the last day of December of the sixth calendar year following election and until the member's successor is elected and qualifies; however, there shall be no change in the composition of any Hearing Panel while a matter is pending unresolved before the Hearing Panel.

Sec. 4. Within sixty days following each General Convention, the Board shall convene to elect a president for the following triennium. The president shall be a Bishop. If there is no president, the Bishop who is senior by consecration shall perform the duties of the president.

Sec. 5. The Conference Panel shall consist of three Bishops, one Priest or Deacon and one lay person. The Hearing Panel shall consist of three Bishops, one Priest or Deacon and one lay person, except that the Hearing Panel for the Offense specified in Canon IV.4.1.h.2 pertaining to Doctrine Offenses shall consist of five Bishops only.

Summary of Work

Since GC 80, The Disciplinary Board for Bishops has met, in whole or in part, 13 times by Zoom. We had an in-person training at the Maritime Center April 17-18, 2023. We appoint certain of the personnel who “staff” a Title IV case: Investigators, Church Attorney, Advisors, Conference Panel, Hearing Panel. The DBB reviews and approves (or not) the language of an Accord between the Presiding Bishop and the Respondent.

The DBB has compiled and forwarded specific suggestions for amendments to Title IV, based on our experience using it. The Chair has meet (once in person, also over Zoom calls) with members of the Standing Commission charged with amending Title IV.

Supplementary Materials

The DBB has made use of Supplementary Materials, largely internal church resources on Title IV. These are readily available.

EPISCOPAL RELIEF & DEVELOPMENT BOARD OF DIRECTORS

Members

Ms. Teri Lawver, Chair	New Jersey, II	2024
Ms. Shirley Allen	Texas, VII	2026
Ms. Putney Cloos	New York, II	2024
Mr. Miguel Escobar	Long Island, II	2025
Mr. Paul Faeth	North Carolina, IV	2024
The Rev. Dr. Canon Michele V. Hagans	Washington, III	2025
Mr. Kenneth Jones	Maryland, III	2026
Ms. Karen Longenecker	Colorado, VI	2026
Mr. Robert McCouch	New York, II	2026
Mr. David Martin	North Dakota, VI	2025
The Rt. Rev. Héctor Monterroso	Texas, VII	2024
The Rev. Steven Paulikas	Long Island, II	2026
The Rev. Christine Purcell	Los Angeles, VIII	2025
Mr. Matt Silva	West Texas, VII	2024
Mr. John Van De Weert	Washington, III	2025
Mr. N. Kurt Barnes	Ex-Officio	
Ms. Jane Cislucyis	Ex-Officio	
The Most Rev. Michael B. Curry, Honorary Chair	Ex-Officio	
Dr. Robert Radtke	Ex-Officio	

Changes in Membership

- The Rt. Rev. Wilfrido Ramos Orench – left in 2020
- Mr. John A. “Jock” MacKinnon – left in 2021
- Ms. Sophie Hollingsworth – left in 2021
- The Rt. Rev. Jennifer Baskerville-Burrows – left in 2022
- Canon Rosalie Simmons Ballentine – left in 2022
- Mr. Michael Carscaddon – left in 2022
- The Rt. Rev. Mary Gray-Reeves – left in 2022
- Ms. Laura Ellen Muglia – left in 2022
- The Rev. Deacon Geoffrey T. Smith – left in 2022

Representation at General Convention

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

Acknowledgements

Key Staff

Ms. Mary Carr, Manager of the Executive Office & Director of Special Projects

Ms. Esther Cohen, Chief Operating Officer

Ms. Josephine Hicks, Chief Church Relations Officer

Ms. Abigail Nelson, Executive Vice President & Chief Strategy Officer

Mandate

Mission Statement

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

Episcopal Relief & Development faithfully administers the funds that it receives from the church and raises from other sources. It provides relief in times of disaster and promotes sustainable development by identifying and addressing the root causes of suffering.

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

Mandate

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

Lord, when was it that

We saw you hungry and gave you food?

We saw you thirsty and gave you something to drink?

We saw you a stranger and welcomed you?

We saw you sick and took care of you?

We saw you in prison and visited you?

'Truly I tell you, just as you did it to one of the least of these who are members of my family, you did it to me.'

—Matthew 25:37-40 (NRSV)

Core Values

As part of the Episcopal branch of what our Presiding Bishop, The Most Reverend Michael B. Curry, calls The Jesus Movement, seeking and serving Christ in all people near and far, everything we do and the way in which we do it is inspired by five core values:

Faith — Faith in Jesus is at the center of our mission as an organization. It gives us the power and the courage to follow Jesus' example by reaching out in compassion to serve the most marginalized and respond to human suffering.

Dignity — We respect the dignity of every human being, seeking and serving Christ in all people as they, in turn, empower themselves and transform the communities in which they live and work.

Relationship — Our relationships are the foundation upon which all our work is built. As we accompany and serve our partners, we nurture and sustain our relationships, thereby unlocking abundance wherever it may be.

Leadership — We lead through learning and collaboration, inspiring creativity and innovation in all aspects of our work, and cherishing the many gifts God has given to our partners and to us.

Excellence — Being, doing, and giving our very best is how we are good stewards of God's abundance.

Our Credo

WE BELIEVE our life-giving, loving, liberating God gives all, gathers all and draws all towards shared wholeness with one another and the concerns of those struggling with poverty, disaster and disease.

WE BELIEVE in faith's power to guide us in honoring the dignity of every human being and in building bridges between and beyond ourselves to the world.

WE BELIEVE bridges built with local presence and assets can transform individuals, communities and systems for better.

WE BELIEVE systemic change requires collaborative, just and reconciling leadership.

WE BELIEVE we are called to right the wrongs and sins of the past, even as we strive to repent of those sins and any we continue to commit.

WE BELIEVE the present state of the world does not fulfill the dream God intends for us.

WE BELIEVE in urgent, bold and inclusive humanitarian action that reaches the most vulnerable, builds toward tomorrow and fosters and spreads hope and healing.

WE BELIEVE in Working Together for Lasting Change.

~We ask God to bless this work~

Summary of Work

Our Approach

At Episcopal Relief & Development, our values drive our work. Together with core Episcopal and Anglican partners, in addition to other faith-based and secular partners, we achieve impact through an approach that is purpose-driven, grounded in compassion and respectful of the dignity of all human beings. Guided by our faith to seek and serve Christ in all people, we collaborate with leaders, communities and locally-led organizations to address the effects of injustice, poverty, disaster and climate change.

We believe no one knows a community better than those who actually live there. We partner with trusted faith leaders and other change agents who have strong community ties and a deep understanding of local context. Our approach, known as Asset-Based Community Development (ABCD), respects the dignity of the communities we serve and builds upon their existing strengths, knowledge and resources to achieve sustainable solutions tailored to the unique challenges they face.

We continually monitor and evaluate the effectiveness of our programs. This allows us to learn from, adapt and improve programming, address challenges and identify opportunities as they emerge, and respond rapidly as community needs change and evolve. Together with community leaders and partners, we're able to leverage what's working well to drive impact, learning and sustainability.

Our goal is to achieve impact that will last long after a program or response ends. Through collaboration and shared learning with local faith and community organizations, we strengthen each partner's capacity to effectively deliver and to sustain and grow the impact we achieved together. This includes bolstering partners' internal systems, processes and policies to promote effective, efficient and quality management of programs. We equip partners with the resources, tools and quality assurance needed to operate within highly challenging contexts and provide effective responses and care amidst disaster, crisis and growing instability.

Our Programs

The Sustainable Development Goals (SDGs) are a universal call to action to end poverty, protect the planet and improve the lives and prospects of everyone, everywhere. The 17 Goals were adopted by all UN Member States in 2015, as part of the 2030 Agenda for Sustainable Development which set out a 15-year plan to achieve the Goals.

Reflecting the SDGs, Episcopal Relief & Development partners with locally-led organizations around the world to advance lasting change in communities impacted by injustice, poverty, disaster and climate change. We focus on four interconnected priorities: (1) Early Childhood Development; (2) Women and Girls; (3) Climate Resilience; and (4) Disaster Response.

Early Childhood Development: Equipping parents and caregivers so young children can reach their full potential.

The quality of care that children receive during the first 1,000 days of life affects them in ways that last a lifetime. That's why investing in parents, caregivers and young children during the critical 0–3 age is so important. In partnership with local faith leaders and change agents, Episcopal Relief & Development promotes nurturing care that fosters responsive caregiving, good health and nutrition, and early learning and play, while working to reduce unhealthy environmental factors like poverty, malnutrition and exposure to violence.

Women and Girls: Forging partnerships to reduce gender-based violence and advance equality.

Episcopal Relief & Development believes everyone deserves to live free from violence in a society where they are treated with dignity and respect. Systems—from cultural to financial—prevent women and girls from achieving equality and fully realizing their goals. Together with our local partners, we equip faith leaders and other trusted change agents to confront harmful social norms and behaviors to prevent and respond to violence against women and girls and advance women's empowerment.

Climate Resilience: Investing in communities to strengthen resilience to climate change.

Extreme weather events like heat waves, droughts and floods are leaving millions of people without food and water. Often, those most at risk are isolated, rural, subsistence farming households, far from basic support services. Episcopal Relief & Development's extensive faith network allows us to reach these most remote communities and, through our partners, provide the skills training, information and access to finance households need to cope and adapt to rising climate risks and uncertainty.

Disaster Response: Providing emergency relief and long-term support in disasters.

Episcopal Relief & Development works through a global network of local faith and community partners to support people impacted by natural disasters and human-made crises like conflict. Our approach is inclusive, comprehensive and forward-looking, building on a community's existing strengths, assets and resources. With our partners, we strengthen community preparedness, provide emergency relief in the wake of a disaster, and support long-term recovery and resilience by investing in communities long after the crisis. We support individuals in shaping their own futures for a full and sustained recovery.

FORWARD MOVEMENT

Members

The Rt. Rev. Susan Brown Snook, Chair	San Diego, VIII	2024
The Rev. Kate E. Wesch, Vice-Chair	Connecticut, I	2025
Canon Brendan O’Sullivan-Hale, Treasurer	Indianapolis, V	2026
Ms. Kate Bond, Secretary	Oklahoma, VII	2026
The Rev. Canon Victor Conrado	New York, II	2024
The Rev. Ryan Fleenor	Connecticut, I	2026
The Rev. Robert Hendrickson	Arizona, VIII	2026
Ms. Kelli Martin	Olympia, VIII	2026
Mr. Jamie McMahan	Pittsburgh, III	2024
Mr. Jason Sierra	Texas, VI	2026
The Rev. Cara Spaccarelli	Indianapolis, V	2024
The Rev. Canon Eva Suarez	New York, II	2026
The Most Rev. Michael B. Curry, Ex Officio	North Carolina, IV	

Staff Management Team

The Rev. Scott Gunn, Executive Director
Ms. Lindsay Barrett-Adler, Director of Development
Ms. Tania Z. Jones, Executive Assistant and Human Resources Specialist
Ms. Kathy Jose, Director of Business Operations
Ms. Miriam McKenney, Director of Mission
Mr. Jason Merritt, Marketing Director
Ms. Loren Dixon, Director of RenewalWorks

Changes in Membership

Robert Hendrickson, Kelli Martin, Brendan O’Sullivan-Hale, Jason Sierra, and Eva Suarez were all appointed to the board. Since our last report, Jean Beniste, Clyde Kunz, and Julie Thomas left the board as terms expired.

Representation at General Convention

Deputy Kate Bond, Deputy Scott Gunn, and Bishop Susan Brown Snook are authorized to receive non-substantive amendments to this Report at the General Convention.

Acknowledgements

The Board of Directors is grateful to donors who support Forward Movement with generous financial gifts. These gifts allow Forward Movement to send almost 100,000 printed copies of material each year to prisons, hospitals, nursing homes, and military bases. Donor gifts also allow Forward Movement to provide discipleship and evangelism resources such as podcasts, apps, and websites free of charge.

Mandate

An agency of the Episcopal Church, Forward Movement was chartered by the 51st General Convention in 1934 “to reinvigorate the life of the church and to rehabilitate its general, diocesan, and parochial work.” Today Forward Movement’s mission is to “Inspire disciples. Empower evangelists.” From its inception, Forward Movement has understood that for the Episcopal Church to be healthy, its congregations must be healthy. For congregations to be healthy, they must be filled with disciples rather than habitual Christians. Our work, then, is to encourage discipleship and evangelism. About sixteen (16) full- and part-time staff members manage Forward Movement’s work, some stationed in offices in downtown Cincinnati and others around the United States. Together, we edit and design the publications, create online resources, organize conferences, market materials, fill orders, and respond to the diverse concerns of those who call and write with comments and questions. We welcome suggestions from congregations and readers on how we can be of more use and offer better service.

Summary of Work

Today, Forward Movement carries out its work in widely varied ways. Perhaps we are known most widely for *Forward Day by Day*, a popular daily devotional published continuously since 1935. While about 90% of subscribers are in the Episcopal Church, this publication is also read in the Anglican Church of Canada, by Anglicans around the world, and by Christians and seekers of all sorts. In addition to print, the devotional is available as a podcast, in Braille, as an e-book, on a smartphone app, by e-mail, and through our social media channels.

Since Lent/Easter 2018, Forward Movement has worked with many organizations across the church to encourage Episcopalians to read whole books of the Bible together in a project called the Good Book Club. The Presiding Bishop has invited us all to go on this journey together. As of this writing, the most recent program was reading the Book of Genesis during the Epiphany season 2024. Visit the Good Book Club website (www.goodbookclub.org) for free resources and details about how this project invites all Episcopalians and their congregations to take part.

In the print realm, we now focus on books, many of which offer opportunities for small group discussion and reflection. We seek to offer resources that encourage discipleship, whether through daily meditation or engagement with the richness of our prayer book tradition. We still sell pamphlets, the cutting-edge technology of our founding era in the 1930s, which continue to be useful in many congregations.

Material for Latino/Hispanic Episcopalians and seekers is an important part of Forward Movement's ministry. We have offered free resources, such as a guide for multi-cultural congregations who wish to celebrate *Las Posadas*. We have created new print and online resources. Our flagship devotional is available in Spanish as *Adelante día a día* in print, as an e-book, on social media, and in other channels.

Forward Movement operates RenewalWorks, a donor-funded ministry aimed at encouraging congregations to assess their spiritual health and vitality and to respond based on what they learn in their assessment. To date over 350 Episcopal congregations have undertaken this work, and a good deal of data on the spiritual health — and challenges — of The Episcopal Church have been amassed. Founded by the Rev. Jay Sidebotham, RenewalWorks is expanding under the leadership of its current director, Ms. Loren Dixon, to offer more resources to congregations.

The current combined annual budget is now about \$2.5 million. Forward Movement is self-sustaining. Funding comes from sales, donations, grants, and investment income. The largest expense is personnel costs. Other major expenses include printing and publication purchase, warehousing and shipping, donations of materials, marketing, and general & administrative. No funding is requested from the General Convention budget.

To learn more about Forward Movement and its work, please visit www.forwardmovement.org. Early in its history, a collect for the ministry of Forward Movement was written, and we hope you will use it to pray for our ministry in the church and beyond.

O God, we ask your guidance and blessing for the Forward Movement of your church. Use it, we pray, to open our eyes to your glory and to the opportunities that lie before the church to reach people everywhere with the good news of Christ. Grant that the leaders of Forward Movement may be both wise and daring disciples and stir up in us the will to share joyfully in this work with our prayers and gifts. Let not our purpose grow slack, that the nations of this world may become one holy people under the kingship of God and of our Lord Jesus Christ. This we ask in His name. Amen.

GENERAL BOARD OF EXAMINING CHAPLAINS

Membership

Bishops

The Rt. Rev. Dr. R. William Franklin, Chair	Long Island, II,	2027
The Rt. Rev. Laura J. Ahrens	Connecticut, I,	2027

Clergy with Pastoral Responsibilities

The Rev. Canon Michael A. Bamberger	Los Angeles, VIII,	2027
The Rev. Dr. Christopher W. Corbin	Fond du Lac, V,	2027
The Rev. Dr. Miranda K. Hassett	Milwaukee, V,	2024
The Rev. Dr. Rhonda M. Lee	North Carolina, IV,	2027
The Rev. Milquella R. Mendoza	Dominican Republic, IX,	2024
The Rev. Dr. Mark D. Story	Oklahoma, VII,	2024

Members of Faculties

The Rev. Dr. Carla E. Roland Guzmán	New York, II,	2027
The Rev. Dr. L. Calvin Lane	Southern Ohio, V,	2024
The Rev. Canon Dr. Hugh R. Page	Northern Indiana, V,	2027
Canon Dr. Gregory A. Robbins	Colorado, VI,	2024
The Rev. Canon Dr. Kara N. Slade, Vice Chair	New Jersey, II,	2024
The Rev. Canon Dr. Andrew R. Wright	Newark, II,	2027

Lay Persons

Dr. Martha E. B. Alexander	North Carolina, IV,	2027
Dr. L. Zoe Cole	Colorado, VI,	2027
Ms. Rachel B. Erdman	Maryland, III,	2024
Ms. Janet P. Roth	Oregon, VIII,	2024
Dr. Peter W. Williams	North Carolina, IV,	2027

Appointments

The Board declined to fill a vacancy caused by the resignation of Ms. Beth M. Bojarski (Rochester, II, 2024).

Ex Officio

The Most Rev. Dr. Michael B. Curry

Ms. Julia A. Harris

Executive Director, Secretary to the Board and GOE Administrator

Duncan C. Ely (South Carolina, IV), 67 Anson St., Charleston, SC 29401-1529

Changes in Membership

- Resignations in 2022:
 - Ms. Beth M. Bojarski (Rochester, II, 2024).

The Rt. Rev. R. William Franklin is authorized to receive non-substantive amendments to this report.

Mandate

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

Summary of Work

The GBEC has been creatively, innovatively and professionally carrying out its canonical responsibilities during the 2022-2024 Triennium, including:

- Refining and continuing through its annual cycle of work:
 - March – May with Question Writing Team recruitment and appointment;
 - June – September with writing and refining questions and their scoring rubrics and with inviting nominations for candidates to sit for the GOE;
 - October – December with vetting and adopting final questions and scoring rubrics; with continuing administrative work with nominated candidates and their seminaries and dioceses; with recruiting and appointing Evaluation Teams and finalizing evaluator training; and with preparing for the electronic administration of the GOE;
 - January – February with administering the exam; with training and qualifying evaluators; with answer evaluation, written feedback and providing results; and with administrative business such as invoicing.
- Continuing long-range restructuring and transforming of all processes and structures under the guidance of its board, staff, professional educational testing and Internet technology consultants, and others to:
 - Recruit volunteers;
 - Improve efficiency and volunteer training specifically in writing questions and evaluating examination answers;
 - Reduce expenses;
 - Provide a GOE that is responsive to TEC’s changing needs;
 - Adhere to the latest and most professional psychometric standards for question creation, volunteer (especially evaluator) training and answer evaluation.
- Administering electronically an annual GOE at all Episcopal seminaries and at more than fifty additional locations throughout the United States and abroad in English and Spanish to:
 - 179 candidates in 2022
 - 179 in 2023
 - 179 (estimated in 2024)

- Evaluating GOE answers and reporting the GOE results and recommendations to:
 - candidates
 - diocesan authorities
 - seminary deans (about results and how their candidates compared with those from other seminaries)
- Meeting at:
 - Annual Meetings of October 4-7, 2022 at Trinity Center, Pine Knoll Shores, NC; October 3-6, 2023 at Trinity Center, Pine Knoll Shores, NC; and October 8-11 2024 at Trinity Center, Pine Knoll Shores, NC.; to finalize and approve the GOE questions and scoring rubrics and transact other business;
 - Evaluation Meetings of February 12-17, 2022 via Zoom and other electronic means due to the pandemic; February 13-16, 2023 at Trinity Center, Pine Knoll Shores, NC; and February 19-22, 2024 at Trinity Center, Pine Knoll Shores, NC; to verify all not proficient answers and write evaluations of those answers.
- Fostering communication with constituents (bishops, candidates, dioceses, seminaries and TEC at large) via website and other electronic means such as:
 - Through GBEC Chair’s annual letter to the House of Bishops;
 - Visits by Executive Director annually in 2019 and 2021 to nearly all Episcopal seminaries and other educational institutions with Episcopal students to meet with students, administrators and faculty, and via Zoom in 2020.
- Managing volunteer corps of about 100 people from throughout TEC by:
 - Recruiting, training, supervising and assisting volunteers in each annual cycle.
 - Utilizing annually about one hundred volunteers working electronically on:
 - Question Writing Teams
 - Field Testing Teams
 - Evaluation Teams
 - Editing and Office Teams

- Evaluating the GBEC's administration and processes (including question writing and answer evaluating) to:
 - Adapt and improve subsequent exams and procedures;
 - Improve volunteer administration and training.
- Receiving feedback from constituents, consultants, staff, board, other volunteers and people from the wider Church evidencing:
 - Timely distribution of GOE results;
 - High level of consistency in evaluations;
 - Efficient management;
 - Responsive communication.
- Continuing to improve a dedicated website to:
 - Impart information about the GBEC and its ministry and the GOEs;
 - Receive nominations of people to take the GOE;
 - Transmit GOE questions, receive GOE answers and supply results to candidates, bishops and seminary deans;
 - Improve communication and reduce to a minimum postage and printing costs;
 - Maintain extensive online information for electronic and print distribution to:
 - Describe the GBEC's history and purpose;
 - Explain the GOE and its administration and evaluation;
 - Post tips for taking the exam;
 - Provide the past fifteen years of GOEs;
 - Make available to candidates interactive practice GOE questions.
- Maintaining Standards for each of the six canonical areas:
 - Widely distributed them throughout TEC for feedback;
 - Published them on the GBEC website.

Report to the 81st General Convention

- Collecting and published extensive annual statistics, a very basic example of which is:

2022 GOE	Overall				Mdiv (Current/Former)				Cioc. Or Locally Trained			
Candidates	161				131				16			
	Proficient		Not Proficient		Proficient		Not Proficient		Proficient		Not Proficient	
Holy Scriptures	129	80%	32	20%	112	85%	19	15%	8	50%	8	50%
Church History	126	78%	35	22%	106	81%	25	19%	9	56%	7	44%
Christian Ethics	117	73%	44	27%	101	77%	30	23%	9	56%	7	44%
Practice of Min.	142	88%	19	12%	119	91%	12	9%	11	69%	5	31%
Christian Theolo.	148	92%	13	8%	122	93%	9	7%	14	88%	2	13%
Christian Worsh.	125	78%	36	22%	105	80%	26	20%	8	50%	8	50%
2023 GOE	Overall				Mdiv (Current/Former)				Cioc. Or Locally Trained			
Candidates	169				142				16			
	Proficient		Not Proficient		Proficient		Not Proficient		Proficient		Not Proficient	
Holy Scriptures	138	82%	31	18%	121	85%	21	15%	9	53%	9	47%
Church History	144	85%	25	15%	121	85%	21	15%	11	84%	3	16%
Christian Ethics	138	82%	31	18%	117	82%	25	18%	10	79%	4	21%
Practice of Min.	154	91%	15	9%	127	89%	15	11%	16	100%	0	0%
Christian Theolo.	148	88%	21	12%	126	89%	16	11%	12	79%	4	21%
Christian Worsh.	137	81%	32	19%	116	82%	26	18%	11	74%	5	26%

2024 (not available by date of submission of this report)

Comments: The GBEC and its testing consultant consider a 75-80% proficiency rate an indication of a good GOE. The actual overall average proficiency rate is 83% for 2016 and 78% for 2017.

Goals and Objectives for the 2019-2021 Triennium

The GBEC's principal objectives during the next triennium will be to continue fulfilling its canonical responsibilities:

- Developing annually a General Ordination Examination;
- Administering it;
- Evaluating the answers;
- Reporting the results to candidates, diocesan authorities and seminary deans;
- Collating and report statistics and analysis.
- Instituting surveys requesting feedback from all constituencies (bishops, candidates dioceses, seminaries and volunteers).

In addition, the GBEC plans to continue:

- Creating examinations that will provide diocesan authorities with useful information for diagnosis and assessment of their candidates;
- Providing seminaries and dioceses with statistics about performance on the annual GOE;
- Reducing costs, leveraging resources, improving efficiency, increasing use of electronic technology, and responding to the needs of TEC with a professionally designed and administered GOE;
- Refining and updating the GBEC website to:
 - Reflect the GBEC's transparency about its work;
 - Allow easy access to information about the GBEC and the GOE;
 - Make the electronic administration of the GOE as user-friendly as possible.
- Building relationships by:
 - Committing to board development and training;
 - Collaborating with other church-wide, provincial and diocesan groups;
 - Working with Episcopal and other seminaries and educational institutions;
 - Communicating with bishops, students and their dioceses.
- Maintain detailed and extensive statistics for every annual cycle.

Board Travel and Meetings

The General Board of Examining Chaplains will meet three times during the next triennium, requiring \$30,000 for 2025, \$30,000 for 2026 and \$30,000 for 2027, for a total of \$90,000 for the triennium.

JOINT NOMINATING COMMITTEE FOR THE ELECTION OF THE PRESIDING BISHOP

Members

The Rt. Rev. Mark Lattime, Co-Chair	Alaska, VIII
Canon Dr. Steven Nishibayashi, Co-Chair	Los Angeles, VIII
Deborah Harmon Hines, Secretary	West Tennessee, IV
Mr. Thomas Alexander	Arkansas, VII
Mr. Eric Bailey	Central Florida, IV
The Rt. Rev. Jennifer Baskerville-Burrows	Indianapolis, V
The Rev. Canon Lydia Kelsey Bucklin	Northern Michigan, V
El Rvdo. Diego Chinguá	Central Ecuador, IX
Mr. Thomas Díaz	Los Angeles, VIII
The Rev. Dr. Antonio Gallardo	Los Angeles, VIII
Ms. Maria Gonzalez	Olympia, VIII
The Rev. Maureen-Elizabeth Hagen	Oregon, VIII
Mr. Warren Hawk	South Dakota, VI
The Rev. Dr. Deborah Jackson	Florida, IV
The Rt. Rev. José McLoughlin*	Western North Carolina, IV
The Rt. Rev. Phoebe Roaf	West Tennessee, IV
The Rt. Rev. Audrey Scanlan	Central Pennsylvania, III
The Rev. Mary Frances Schjonberg	Newark, II
The Hon. Rose H. Sconiers	Western New York, II
The Rev. Kit Wang	Maine, I

1

Changes in Membership

The Rt. Rev. José A. McLoughlin was appointed by Presiding Bishop Michael Curry in October 2022 to complete the term of the Rt. Rev. Rob Wright, who resigned.

Acknowledgements

Committee members are grateful to their predecessors who, leading up to the election of Presiding Bishop Michael Curry in 2015, published three essays to inform The Episcopal Church about how the office of presiding bishop has evolved and changed; the current roles, functions, and responsibilities of the presiding bishop; and the timeline and steps in the nominating and election process. The committee thanks Bishop R. William Franklin, the author; and Sally Johnson and Bishop Ed Konieczny,

previous co-chairs, for their gracious permission to allow these essays to be updated and reposted. Those essays were released by the Office of Public Affairs in March 2023.

Amanda Skofstad, her colleagues in the church's Office Public Affairs, as well as Matthew MacDonald of Episcopal News Service, have been invaluable to the committee's efforts to fulfill the committee's commitment and canonical requirement to inform The Episcopal Church of its work.

Mandate

2022 - Canon I.2.1

Sec. 1

a. At each General Convention a Joint Nominating Committee for the election of the Presiding Bishop shall be elected. The Nominating Committee shall be comprised of 20 members, as follows: five Bishops elected by the House of Bishops; five clergy persons, including at least one deacon, and five lay persons elected by the House of Deputies who may but need not be members of that House; two persons, age 16-23, appointed by the President of the House of Deputies; and three persons appointed jointly by the Presiding Bishop and the President of the House of Deputies to ensure the cultural and geographic diversity of the Church. The Joint Standing Committee on Nominations will nominate a slate of nominees for the elected positions, in accordance with its canonical charge and procedures. In all cases, the nominees and appointees shall have the skill sets needed for effective service on the Nominating Committee.

b. In the event vacancies shall occur in the Joint Nominating Committee after the election of its members due to death, disability, resignation, or other cause within one year of the next General Convention, the vacancies shall not be filled and the remaining members shall constitute the Joint Nominating Committee. In the event such vacancies shall occur more than one year prior to the next General Convention, the Presiding Officer of the House of Bishops shall appoint Bishops and the President of the House of Deputies shall appoint Clerical and Lay Deputies. A Lay member of the Committee who is ordained Presbyter or Deacon, or a Presbyter or Deacon who is consecrated a Bishop before the next General Convention, shall not thereby become ineligible to continue to serve on the Joint Nominating Committee through the next succeeding General Convention.

c. The Joint Nominating Committee shall remain in office until the adjournment of the next General Convention, at which a new Joint Nominating Committee shall be elected. Members of the Committee are eligible for reelection.

[Because the 80th General Convention was postponed from 2021 to 2022 due to the COVID-19 pandemic, the election was held online during the summer of 2021. Committee members, who represent all nine provinces of The Episcopal Church, come from 15 dioceses in the United States and the Diocese of Central Ecuador.]

d. The Joint Nominating Committee shall develop and manage a process for soliciting and identifying qualified nominees for the office of Presiding Bishop and for providing the nominees to the General Convention at which a Presiding Bishop is to be elected. The process must enable the work to be done

efficiently and as cost-effectively as practicable. This process shall be designed to encourage diversity that reflects the breadth of The Episcopal Church. The process shall include (1) the Nominating Committee shall inform the wider church of the process and timeline; (2) the Nominating Committee shall prepare a profile for the election of the next Presiding Bishop, and the profile will be distributed widely to the Church; (3) providing the names of not fewer than three members of the House of Bishops for consideration by the House of Bishops and the House of Deputies in the choice of a Presiding Bishop; (4) establishing a timely process for any bishop or deputy to nominate any other member of the House of Bishops through a petition process, and for each Bishop so nominated to be vetted through the same process of background and reference checks as all nominees, and for each Bishop so nominated to be included in the information distributed about the nominees; and (5) providing pastoral care for each nominee bishop and his or her family and diocese.

Summary of Work

October 14, 2021: The Rev. Canon Michael Barlowe, secretary of the General Convention and executive officer, and the Rev. Dr. Molly James, deputy executive officer, led introductory exercises and briefed the committee on its canonical roles and responsibilities, committee functions and structure, including a leadership team structure. (Meeting held via Zoom in keeping with The Episcopal Church's meeting protocols at the time.)

The General Convention Office conducted an online poll of the members about leadership team structure.

November 5, 2021: Canon Barlowe shared the results of that poll. (Meeting held via Zoom in keeping with The Episcopal Church's meeting protocols at the time.)

November 17, 2021: The committee decided to cast an online ballot to elect a leadership team consisting of two co-conveners, secretary, project manager, chaplain and a communicator. The members subsequently elected

Co-chairs: Bishop Mark Lattime and Canon Steven Nishibayashi

Secretary: Dr. Deborah Harmon Hines

Chaplain: The Rev. Deborah Jackson

Communicator: The Rev. Mary Frances Schjonberg

(Meeting held via Zoom in keeping with The Episcopal Church's meeting protocols at the time.)

January 18-20, 2022: The committee met via Zoom after its planned in-person meeting due to The Episcopal Church's meeting protocols at the time because of the Omicron wave of the pandemic. The members did more get-acquainted work, discussed meeting and communications norms and set a subcommittee structure. Those subcommittees are:

- Profile
- Nominations
- Communications
- Pastoral Care
- Budget

The committee decided to have a booth in the exhibit hall during the July 2022 meeting of the 80th General Convention and three listening sessions for 50 people each to take advantage of a historic opportunity to hear Episcopalians attending convention about their hopes and dreams for the church's next presiding bishop. Those plans were cancelled when attendance at the 80th was restricted

May 24-26, 2022: In the first in-person gathering since beginning their work in the fall of 2021, the members spent time working in plenary and subcommittee sessions. The committee built a timeline of its work leading to the 81st meeting of General Convention. Members committee also met via Zoom

with Sally Johnson and Bishop Ed Konieczny, the co-chairs of the previous joint nominating committee. (Maritime Conference Center, Linthicum Heights Maryland)

October 27-29, 2022: The committee met with Presiding Bishop Michael Curry in person Oct. 27. The following morning, 26th Presiding Bishop Katharine Jefferts Schori met with the committee via Zoom. They both shared their experiences of the discernment and nominations processes that led to their election. They also told the committee about how they fulfilled the duties of the office during their terms. Committee members began to assess the group's intercultural competency and recognize—and compensate for—internal biases as the nomination process moves forward. (Maritime Conference Center, Linthicum Heights Maryland)

January 11-13, 2023: Members, some of whom participated remotely, used Zoom to interview people who have worked closely with Presiding Bishop Michael Curry and his predecessor, Bishop Katharine Jefferts Schori. The committee's goal was to learn more about the scope and challenges of the presiding bishop's work. The members also learned what Episcopalians said in its online survey that was available Oct. 10-31, 2022, about the skills, qualities, and gifts the church ought to seek in its next presiding bishop, considering what the church and the world may look like in the next decade. The survey, hosted by the General Convention Office, received 6,092 responses. (Sheraton Gateway Los Angeles Hotel)

March 3, 2023: The committee met via Zoom to review the first draft of the “Profile for the Election of the 28th Presiding Bishop.”

March 31, 2023: The committee met via Zoom to approve the final version of the “Profile for the Election of the 28th Presiding Bishop.”

July 26, 2023: The committee met via Zoom to review the process for reading completed applications from bishops who has agreed to enter discernment with it. Members also committed to a confidentially agreement and covenant pertaining to the applications.

September 7-9, 2023: The meeting followed the committee's call for nominations from May 15 to July 15. During that time, 111 Episcopalians submitted bishops' names. The committee invited those bishops to enter the discernment process. Those who agreed provided biographical information, references, and written and video responses to several questions. The videos and written materials in the bishops' applications helped the committee decide which candidates the members interviewed virtually during the fall. (Hilton St. Louis Airport)

When the committee did not meet in person, its work, both in plenary and subcommittees, was carried out via Zoom conference calls, email, and interchanges through Microsoft Teams, the General Convention Office-supplied web-based collaborative work platform.

Planned meetings

Jan. 9-11, 2024

March 17-22, 2024

Communicating with the church regarding the role of presiding bishop and the committee's process (as required by Title I.2.1(d))

1. Set up and maintained a Facebook page, Twitter and Instagram accounts, and an email address.
2. Created a 90-second video to explain the committee's work and asking for the church's help, including its prayers. The video (<https://media.episcopalchurch.org/video/greetings/?wchannelid=3ctu7rksou&wmediaid=552c16sroy>) was posted on the General Conventions media hub and on the committee's social media channels.
3. Co-Chair Alaska Bishop Mark Lattime was also interviewed by Public Affair Officer Amanda Skofstad for inclusion in an episode (<https://media.episcopalchurch.org/video/gc80-show/?wchannelid=u0ozx2qu3w&wmediaid=uyjx1u057m>) of the Office of Communication's Convention Daily.
4. In the months leading up to the May 15, 2023, publication of the profile and call for nominations, the committee reissued updated versions of three essays described above in the acknowledgements section.
5. During the May 15, 2023-July 15, 2023, nominations period, the committee publicized the fact that it was receiving names via a social media campaign, sponsorship efforts with Episcopal News Service and press releases.
6. Called the church to pray with committee members, including offering a prayer that congregations were encouraged to include in the Prayer of the People until the election. The prayer, based on the prayer for the election of a bishop or other minister (page 818, The Book of Common Prayer), is:

Almighty God, source of all wisdom and understanding: Look graciously on your church, and so guide the hearts and minds of those who will choose our next presiding bishop, that we may receive a faithful pastor who will care for all of your people, equip us for our ministries, and proclaim your word to us and to the world, through Jesus Christ our Lord. Amen.

7. Between January 2021 and the writing of this report in the fall of 2023 the committee issued 13 press releases and eblasts meant to maintain transparency about the process, to provide information, and to promote awareness.
8. All communications and materials were available in English, French and Spanish.

The House of Bishops received briefings and updates on the committee's work at its meetings in March 2022, September 2022, March 2023, and September 2023.

Profile

As the committee developed a profile for the next presiding bishop, it created a web-based survey through the General Convention office to involve members of The Episcopal Church in discerning the

skills, qualities, and gifts the church seeks in its next presiding bishop, considering what the church and world may look like in the next decade.

More than 6,000 people respond to the survey, issued in October 2023. They said that the next presiding bishop ought to be a strong leader; have a love of preaching and the ability to effectively communicate; and, above all, be a person of strong faith.

They also said that the environmental crisis, violence, conflict and war, and inequality and division are pressing issues facing the world and that the church is called to address those issues. Respondents said that the challenges that the church faces include embracing the call to evangelism; teaching the faith; nurturing individuals' own faith; and adapting to current realities.

The committee combined the responses to what the members learned during the extensive interviews outlined above, and through the members' own discussions and prayer, into the "Profile for the Election of the 28th Presiding Bishop," released on May 15, 2023.

The committee invited Episcopalians to submit the names of bishops that, after prayerful consideration, they thought God is calling and has equipped to serve as the 28th presiding bishop. The committee also invited bishops who felt they are so called and equipped to contact the committee.

See Supplemental Material for profile

Process and Timeline

The period for nominations was open May 15-July 15, 2023. Bishops who had agreed to join the committee's discernment were asked to submit, by August 15, 2023, contact and other personal information, references, answers to short essay questions (two of which were to be answered via videos) and a video of a sermon.

Bishops submitted their applications via a Dropbox account established for that purpose. Committee members accessed each bishop's material in Dropbox.

At the time of this report, the Committee has conducted video interviews with all candidates who submitted the requested information and essay responses.

Committee members will use the remaining meetings in January and March 2024 to discern its selection of nominees, which it will announce in the spring of 2024. There will then follow a set period, in accordance with a process that it will announce, any deputy to the 81st General Convention or bishop may indicate an intent to nominate other bishops from the floor at the General Convention. The committee will vet those nominees with the same process it used for its nominees.

Budget

Allocated Funds: \$149,050

Expenses to date: \$188,688*

* We anticipate this total increasing to at least \$219,100 by the end of our work.

Based on our experience this triennium, we urge the following budget for the next JNCPB.

6 in-person meetings (2/year) @ \$20,000/meeting	\$120,000
1 candidate retreat	\$40,000
Background/medical checks	\$40,000
Interpretation	\$20,000
Translation	\$10,000
TOTAL	\$230,000/triennium

The committee wishes to express its concern about its budget and the fact that we were led to believe that the money needed to do our work would be available. We were told in the fall of 2021 there \$150,000 was available for our work. We did not receive advice about whether this amount seemed reasonable for the work of such a unique interim body as ours. We later realized that this amount was insufficient to cover the expenses for the way in which we felt we needed to conduct our discernment.

We appreciate the additional \$60,000 allocated to the committee's work from the overall interim bodies' budget (line #13 (519a) in the General Convention-adopted 2023-2024 budget <https://www.episcopalchurch.org/wp-content/uploads/sites/2/2022/07/Adopted-GC-2023-2024-Budget-071122-English.pdf>).

Committee members are glad that the Executive Council Joint Budget Committee continues to use a specific line item for the JNCPB (#16 (523) in the General Convention-adopted 2023-2024 budget <https://www.episcopalchurch.org/wp-content/uploads/sites/2/2022/07/Adopted-GC-2023-2024-Budget-071122-English.pdf>). The committee notes, however, that this budget line in the Joint Budget Committee's October 6, 2023, draft version of the 2025-2027 budget (<https://extranet.generalconvention.org/staff/files/download/32296>) continues to use the designation of "accrual for PB Nomination, Election, Transition, Installation." There is no detail about amounts available for each task.

We urge that money be specifically budgeted for each of these tasks. Based on our experience and projected expenses, we recommend a line item dedicated to the Joint Nominating Committee for the Election of the Presiding Bishop and that it be budgeted at \$75,000/year (\$225,000/triennium) to ensure that the next iteration of this committee has the resources it needs to responsibly carry out its mandate.

The tasks of transition and installation are the work of separate canonically mandated committees (Canon I.2.1.e and Canon I.2.1.f) and ought to be funded through their own budget line items.

Supplementary Materials

PROFILE FOR THE ELECTION OF THE 28TH PRESIDING BISHOP

presented by the Joint Nominating Committee

for the Election of the Presiding Bishop (JNCPB)

I.A Letter to The Episcopal Church from the Joint Nominating Committee for the Election of the Presiding Bishop

“For surely I know the plans I have for you, says the LORD, plans for your welfare and not for harm, to give you a future with hope.” (Jeremiah 29:11)¹

Dear friends in Christ,

We are humbled to have been entrusted by this church with the task of “[developing] and [managing] a process for soliciting and identifying qualified nominees for the office of Presiding Bishop” (Canon I.2.1(f)). It is with great joy that we share the “Profile for the Election of the 28th Presiding Bishop.”

The document before you fulfills one of our canonical mandates, that we “shall prepare a profile for the election of the next Presiding Bishop,” and that “the profile will be distributed widely to the Church” (Canon I.2.1(d)). This profile will help the members of this church—and particularly, the members of the House of Bishops, which will elect the next presiding bishop, and the House of Deputies, which will confirm the election—learn of our work thus far.

We have welcomed input from across the church; and here, we have given voice to what we have discerned. As such, this profile articulates from our perspective where we believe The Episcopal Church stands today and to where Christ now calls us. The profile is written in a narrative style, as a means of illustrating, and not simply listing, what we have discerned. It culminates with an invitation for you to join us in discerning candidates for our next presiding bishop. An executive summary that distills the themes and claims of this document can be found at the end.

The election of the 28th presiding bishop is a decisive moment for The Episcopal Church. The church faces challenges and opportunities that are unlike anything we have encountered in recent times. As the prophets of old would have put it, “We find ourselves in a strange land.” This profile speaks to many of these challenges and opportunities, and it attempts to describe the presiding bishop that The Episcopal Church seeks for our time and the near future. But as Holy Scripture teaches us time and time again, our Lord has plans for us—plans for “a future with hope.” God is faithful; and for that, we give “most humble and hearty thanks” (Book of Common Prayer, p. 58). Indeed, it is an exciting time for The Episcopal Church.

Thank you for joining us in this work. We ask that you continue to hold us in your prayers, as we continue to hold each of you in ours.

Faithfully yours,

The Rt. Rev. Mark Lattime, co-chair
The Diocese of Alaska

Canon Dr. Steven Nishibayashi, co-chair
The Diocese of Los Angeles

Dr. Deborah Harmon Hines, secretary
The Diocese of West Tennessee

The Rev. Dr. Deborah Jackson, chaplain
The Diocese of Florida

Mr. Thomas Alexander
The Diocese Arkansas

Mr. Eric Bailey
The Diocese of Central Florida

The Rt. Rev. Jennifer Baskerville-Burrows
The Diocese of Indianapolis

The Rev. Canon Lydia Kelsey Bucklin
The Diocese of Northern Michigan

The Rev. Diego Chingúá
The Diocese of Central Ecuador

Mr. Thomas Diaz
The Diocese of Los Angeles

The Rev. Dr. Antonio Gallardo
The Diocese of Los Angeles

Ms. Maria Gonzalez
The Diocese of Olympia

The Rev. Maureen-Elizabeth Hagen
The Diocese of Oregon

Mr. Warren Hawk
The Diocese of South Dakota

The Rt. Rev. José McLoughlin
The Diocese of Western North Carolina

The Rt. Rev. Phoebe Roaf
The Diocese of West Tennessee

The Rt. Rev. Audrey Scanlan
The Diocese of Central Pennsylvania

The Rev. Mary Frances Schjonberg
The Diocese of Newark

The Hon. Rose H. Sconiers
The Diocese of Western New York

The Rev. Kit Wang
The Diocese of Maine

II. Our Work of Discernment

“Jesus said, ‘...where two or three are gathered in my name, I am there among them.’” (Matthew 18:20)

Christ teaches us that he meets us when we gather in his name. Therefore, we know that the work of discernment, of looking for God’s presence among us, is inherently collaborative. This work must be done alongside others. As such, our work has included:

1. A **churchwide survey**,² by which over 6,000 respondents shared with us their hopes for and concerns about the world, The Episcopal Church, and the next presiding bishop.

2. Dozens of **interviews** with current and past presiding bishops, churchwide leaders, denominational staff members, and other individuals serving in close proximity to the presiding bishop, by which interviewees reflected upon their experiences in those roles.
3. Extensive **conversation and prayer** as a JNCPB, the elected and appointed membership of which is richly diverse in demographics, ministerial context, and theological perspective.

Each of these components has contributed to this profile. Often, we found consensus between our means of discernment. Sometimes, we found divergent opinions among survey respondents, interviewees and our conversations. This profile aims to acknowledge and synthesize the breadth of our findings. We faithfully present this profile based on our research and discernment thus far, and we will continue to seek the guidance of the church and the Holy Spirit as the nomination process continues.

III. The World and the Church of Our Time

The World of Our Time

In our survey of the church, we asked, “What are the three major global issues in the next 10 years?” Between the survey and our own methods of discernment, there seems to be much consensus. Below, we will identify the top three issues facing the world over the next 10 years:

1. Environmental Crisis

“May you be blessed by the LORD,
the maker of heaven and earth.
The heaven of heavens is the LORD’s,
but he entrusted the earth to its peoples.” (Psalm 115:15–16)

We have discerned that **the environmental crisis is one of the most pressing issues facing our world today, and that it must be an absolute priority over the next 10 years.** This is shown consistently across all kinds of demographics from our discernment work: race, ethnicity, sexuality, age, geography, and order of ministry. As the psalmist prays, God has entrusted to us the care of creation, but we have “betrayed [God’s] trust” (Book of Common Prayer, p. 370), and “we have denied...[God’s] goodness...in the world [God has] created” (Enriching Our Worship 1, p. 19). The consequences are many: the deterioration of ecosystems, the increasing change of climate, the depletion of resources, and the lack of sustainable energy, all of which most often fall at the expense of the already marginalized communities among us. In these ways, the global climate emergency continues to be the most pressing

issue facing the world over the next years. The Episcopal Church must recommit itself to the creation that God has entrusted to us.

2. Violence, Conflict, and War

“[The LORD] shall judge between the nations,
and shall arbitrate for many peoples;
they shall beat their swords into plowshares,
and their spears into pruning hooks;
nation shall not lift up sword against nation,
neither shall they learn war any more.” (Isaiah 2:4)

We have discerned that **violence, conflict, and war are also among the most pressing issues facing our world today**. This particularly includes the Russian invasion of Ukraine that began in February 2022, relentless racial violence, and ongoing gun violence—all horrible exercises of power and needless slaughtering of human life. Unnecessary violence, conflict, and war have taken a disturbing place of prominence in our day. From our perspective, over the next 10 years, The Episcopal Church will need to recommit itself in substantial ways to those words of the Lord given to the prophet Isaiah: that instruments for war be refashioned into instruments for the common good; that systems of death be displaced by systems of life; and that we shall not “learn war any more.”

3. Inequality and Division

“My brothers and sisters, do not claim the faith of our Lord Jesus Christ of glory while showing partiality...Have you not made distinctions among yourselves and become judges with evil thoughts?” (James 2:1, 4)

The Letter of James proclaims a powerful vision, reminding us that we tend to make ourselves “judges,” making “distinctions among [ourselves].” But this is not the way of Jesus Christ. In just this way, we have discerned that **the inequality and division of our day are also among the most pressing global issues**. These issues are fueled by systemic discriminations of all kinds: racism, nationalism, xenophobia, heterosexism, homophobia, transphobia, ageism, ableism, classism, and unfortunately, many others. And indeed, The Episcopal Church itself is plagued by such inequalities and divisions in its own particular way. There is much truth-telling and reckoning work to be continued by The Episcopal Church over the next 10 years.

The Church of Our Time

In our survey of the church, we asked, “What are the three major issues facing The Episcopal Church in the next 10 years?” Many survey respondents spoke to the

significant decline in church attendance and membership,³ and across our methods of discernment, we have found consensus around four particular challenges that The Episcopal Church faces for its next 10 years, each of which is related to the trend in church attendance and membership:

“Jesus said, ‘Go therefore and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit and teaching them to obey everything that I have commanded you...’”
(Matthew 28:18–19a)

1. We have discerned that the church faces a **challenge of evangelism**, a word that has been rightfully reclaimed by Episcopalians in recent years. Christ’s “Great Commission” to us is to “go...and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit. (Matthew 28:19)” This certainly includes long-term efforts, such as church-planting, but it primarily includes the daily efforts that are fundamental to the life of all Christian people (Book of Common Prayer, pp. 855–6). Evangelism is about looking for where the Holy Spirit has been at work in the world all along. Evangelism is about being sent out to meet God there, “to do the work [God] have given us to do, to love and serve [God] as faithful witnesses of Christ our Lord” (Book of Common Prayer, p. 366). God has done a good work in The Episcopal Church over the past several years, building us up to be the evangelists that we were baptized to be; we pray that God will continue this work in us these next 10 years.
2. We have discerned that the church faces a **challenge of “catechesis,” of teaching the faith**. Just as we cannot neglect the command to “make disciples of all nations,” we cannot neglect Christ’s command to “[teach] them to obey everything that [he has] commanded [us].” From our perspective, The Episcopal Church seems ready to recommit itself to faith formation across all ages—particularly to youth ministry and campus ministry—and to the work of raising up and forming leaders, both lay and ordained. Passing on and building up our unique witness to the Christian faith will be essential over the next 10 years.
3. We have discerned that the church faces a challenge of **nurturing our own faith**. After all, we cannot proclaim what we do not know (Romans 10:14). With a strong and well-nurtured faith, we might join Peter and John in boldly proclaiming, “We cannot keep from speaking about what we have seen and heard” (Acts 4:20). We believe that we are in a moment in which individual Episcopalians need to tend to their own faith, to go deeper, for it is only by this that we can take up

the work Christ has laid before us. This work is vital, particularly over the next 10 years.

4. We have discerned that the church faces a challenge of **adapting to our current reality**. This is not an act of defeatism; after all, Christ’s commission to go, baptize, and teach is always before us. Rather, it is a process of reordering ourselves and our priorities to meet the needs of our day. We see glimpses of creative adaptation: neighboring dioceses discerning how best to share their resources; the General Convention reevaluating its procedures; our seminaries engaging in new partnerships; and so on. Such work will be crucial for The Episcopal Church over the next 10 years.

IV.A Presiding Bishop for Our Time

This section of the profile aims to articulate the particular qualities that The Episcopal Church seeks in the next presiding bishop. Of course, there are many specific roles and functions of the office that remain consistent between tenures (see “Canonical Qualifications, Terms, Roles, and Functions”). But here, we aim to reflect on what we have discerned is needed in a presiding bishop for our time.

Several qualities and characteristics came to the surface and found consensus, including:

- A fidelity to prayer and study.
- A commitment to physical, mental, and spiritual self-care.
- A demonstrated capacity for personal growth over time.
- A recognizable love of learning and of challenges.
- A desire to collaborate with people.
- A demonstrated capacity for transforming systems at local and diocesan levels.
- A commitment to building relationships with others and for others.
- A genuine personality, gracious disposition, and good sense of humor.

Below, we will identify **three particularly important characteristics** desired in our next presiding bishop, not only because these characteristics found great consensus in our work of discernment, but because they are deeply connected to the challenges and opportunities that we have outlined above:

1. Strong Leadership

“[Christ] himself granted that some are apostles, prophets, evangelists, pastors and teachers to equip the saints for the work of ministry, for building up the body of Christ, until all of us come to the unity of the faith and of the knowledge of the Son of God, to maturity, to the measure of the full stature of Christ” (Ephesians 4:11–13).

The Episcopal Church wants a **presiding bishop of strong leadership to lead us into the challenges before us**. We acknowledge that strong leadership looks different depending on the person, but this leadership must always be strategic, articulate, collaborative, committed, and gracious. The next presiding bishop will have demonstrated a capacity for this kind of strong leadership during their work in a diocese, and will have demonstrated an aptitude for leadership through systemic change. And as Scripture memorably illustrates, this leadership is always for the “building up the body of Christ,” the church. The presiding bishop’s leadership style should be one of both strategic visioning and of enabling others, of building up the body, “until all of us come...to the full stature of Christ.”

2. Love of Preaching and Communicating

“For I long to see you so that I may share with you some spiritual gift so that you may be strengthened...” (Romans 1:11)

This sense of Paul’s “longing” is what The Episcopal Church is looking for in a presiding bishop: **someone who longs to bring a word to The Episcopal Church and to the world**. Not only should the next presiding bishop be a strong preacher—a quality that differs depending on the given preacher—but someone who truly loves to preach. This work of “bringing a word” takes place beyond the pulpit. It takes place on social media and in letters to The Episcopal Church; at diocesan conventions and in staff meetings; in Executive Council meetings; and in House of Bishops gatherings. And given the breadth of this church, the work of preaching and communicating inherently takes place across a variety of cultures and people. The next presiding bishop should have the language to speak to a diverse church, to speak across difference.

3. Faithfulness

“...the Lord commanded that those who proclaim the gospel should get their living by the gospel.” (1 Corinthians 9:14)

“Faithfulness” is the last characteristic to be listed, but it is by no means the least. In fact, it is the most important, because, as the Apostle Paul

reminds us, the work of proclaiming the gospel should be grounded in “living by the gospel.” As the Book of Common Prayer has us pray, we show forth God’s praise “not only with our lips, but in our lives” (p. 101). This insistence on faithfulness consistently and compellingly appeared in our survey results, interviews, and conversations. The next presiding bishop should be one who is **deeply grounded in their faith and hope in Christ and steadfastly committed to the living tradition of The Episcopal Church**. They should be fully authentic and a person of palpable integrity, always ready to offer “an accounting for the hope that is in [them]” (1 Peter 3:15).

V. Canonical Qualifications, Terms, Roles, and Functions

Canonical Qualifications

The Episcopal Church’s Constitution and Canons do not set any limitations or requirements on which bishops of the church may serve as presiding bishop. Any bishop of The Episcopal Church on the day nominations are received in a joint session of the House of Deputies and House of Bishops at General Convention is eligible, subject to being nominated in accordance with the Canons and processes prescribed by the JNCBPB. However, consideration must be given to the canonical provisions on the term described below.

Term

The presiding bishop’s term is nine years beginning Nov. 1, 2024, and concluding Oct. 31, 2033. If the presiding bishop reaches the age of 72 prior to the completion of the term, they must resign to the General Convention closest to the date on which they turn 72, and a new presiding bishop would be elected at that General Convention for a term of nine years beginning Nov. 1 following the close of General Convention (Canon I.2.2).

Roles and Functions

The primary source for understanding the role and responsibilities of presiding bishop is the church’s Constitution and Canons.

The church is most familiar with the presiding bishop’s responsibilities to:

- Provide leadership in developing policies and strategies for the church and speaking for the church on the policies, strategies, and programs of General Convention.
- Visit every diocese of The Episcopal Church (Canon I.2.4(a)).

- Speak God's words to the church and to the world as the representative of this church.
- Represent The Episcopal Church in the Anglican Communion as primate.
- Participate in the ordination and consecration of bishops.
- Preside over the House of Bishops.

Additionally, the presiding bishop has various responsibilities for:

- Congregations in foreign lands, including Micronesia and the Convocation of Episcopal Churches in Europe.
- The consent process upon the election of bishops.
- Members of religious orders and Christian communities.
- The Episcopal Church in Navajoland.
- Federal chaplaincies and the bishop for federal ministries.
- Dioceses without bishops.

The presiding bishop also has significant responsibilities for the discipline and changes in status of bishops:

- Receives requests from bishops for release and removal from the ministry of The Episcopal Church.
- Receives resignations of bishops.
- Receives evidence of the incapacity of bishops.
- Issues pastoral directions, restrictions on ministry, and administrative leaves to bishops.
- Appoints the intake officer for complaints against bishops.
- Serves on the Reference Panel of the Disciplinary Board for Bishops.
- Certifies abandonment of communion by bishops.
- Processes charges of violations of doctrine by bishops.

- Has a significant role in proceedings to terminate the relationship of a bishop and a diocese.

The **governance functions** of the presiding bishop include:

Appointments: The presiding bishop appoints bishops to all the standing commissions, joint standing committees, task forces of General Convention, committees of the House of Bishops, legislative committees of the House of Bishops at General Convention, Board of Transition Ministries, and Board of Archives. They make other appointments to the General Board of Examining Chaplains and United Thank Offering Board; appoint personal representatives to standing commissions; and, in the event of a vacancy, appoint the registrar.

Appointments with President of the House of Deputies: The presiding bishop and president of the House of Deputies jointly appoint the Executive Council committees, Executive Council members to serve as liaisons to each standing commission, the chief operating officer, chief financial officer, and chief legal officer of Executive Council, the executive officer of General Convention, and the treasurer of General Convention in the event of a vacancy. They may jointly change the date and length of General Convention, appoint, and may designate the house of initial action for every resolution before General Convention.

Member of Committees and Commissions: The presiding bishop is an ex officio member of every standing commission and joint standing committee, as well as other governance bodies.

Chair and President of Governing Boards: The presiding bishop serves as the president of the Domestic and Foreign Missionary Society (DFMS), the New York nonprofit corporate entity through which The Episcopal Church owns property and does business. The Executive Council is the board of directors of this corporation. The presiding bishop is also chair and president of the Executive Council, and as such, has “ultimate responsibility for the oversight of the work of the Executive Council in the implementation of the ministry and mission of the Church as may be committed to the Executive Council by General Convention” (Canon I.4.2(a)).

The **executive functions** of the presiding bishop include:

Chief Executive Officer of Executive Council: As the CEO of Executive Council, the presiding bishop is responsible for the day-to-day functioning of the staff of Executive Council and the operations of the Church Center in New York and other offices of the church. This means the presiding bishop has responsibility for the finances, management of real estate, staff, and programs for most functions at the churchwide level, with the major exceptions being the staff and operations of the executive office of the General Convention, and the office and staff of the president of the House of Deputies.

Other Executive Functions: In addition to the staff of Executive Council, the presiding bishop is responsible for the staff and activities in their office, which typically include, at a minimum, a canon to the presiding bishop, and the bishop in charge of the Office of Pastoral Development.

Some roles of the presiding bishop are not specified in the Constitution and Canons but naturally result from them. Still other roles are given to the presiding bishop by other organizations, and these include:

Speaker and Preacher: The presiding bishop is a sought-after speaker and preacher by innumerable organizations and groups in The Episcopal Church and Anglican Communion. As such, the presiding bishop travels extensively.

Provide Hospitality: On behalf of the whole church, the presiding bishop offers hospitality to visiting church leaders, members of the Anglican Communion, and ecumenical and interfaith visitors.

Leader of Related Organizations: The presiding bishop has leadership roles with several other organizations closely related to The Episcopal Church, including appointing and/or serving on the governing boards of Episcopal Relief & Development, and the College for Bishops.

VI. An Invitation to Discern

We now invite you all to join us in this work in a particular way, by discerning individuals who might be called to the office of presiding bishop and to the work that lies before our church. The JNCPB will contact all bishops whose names are submitted to invite them to participate in our discernment process and to provide application materials.

To submit a name for the JNCPB's consideration, please complete this form. The deadline for submitting names is **Saturday, July 15, 2023**, and the deadline for submitting application materials is **Tuesday, Aug. 15, 2023**.

VII. Executive Summary

Our Work of Discernment

This profile makes use of three primary tools for data collection:

1. A churchwide survey with over 6,000 respondents.
2. Dozens of interviews.
3. Countless hours of conversation and prayer.

The World and the Church of Our Time

The Episcopal Church identified three particularly pressing issues facing our world today:

1. The environmental crisis.
2. Violence, conflict, and war.
3. Inequality and division.

We identified four particularly pressing challenges facing our church today:

1. A challenge to embrace our call to evangelism.
2. A challenge to teach the faith.
3. A challenge to nurture our own faith.
4. A challenge to adapt to current realities.

A Presiding Bishop for Our Time

The Episcopal Church identified three particularly important qualities of the next presiding bishop:

1. Strong leadership.
2. A love for preaching and communicating.
3. Faithfulness.

The Canonical Qualifications, Terms, Roles, and Functions

The Constitution and Canons of The Episcopal Church define a number of requirements, roles, and duties of the presiding bishop.

Canonical Qualifications: The presiding bishop must be a member of the House of Bishops of The Episcopal Church.

Term: The term is nine years, beginning on Nov. 1, 2024, and ending on Oct. 31, 2033. If the presiding bishop reaches age 72 prior to completion of the term, the presiding bishop must resign to the General Convention closest to the date on which they become 72.

Roles: The presiding bishop speaks for the church on policies and programs of General Convention, speaks God's word to the church and world, represents the church to the Anglican Communion, and presides over the House of Bishops. The presiding bishop also has responsibilities for a wide variety of other ministries and jurisdictions. Other responsibilities include a significant role in various aspects of the discipline and changes in status of bishops.

Governance Functions: In the governance of the church, the presiding bishop has a variety of responsibilities in appointments to various governing bodies: making decisions with the president of the House of Deputies; serving as a member of every committee and

commission of the church; and serving as chair and president of the key governing boards of the church.

Executive Functions: The presiding bishop is chief executive officer of the Executive Council and therefore responsible for staff and operations of the Church Center, with the exception of the executive office of the General Convention.

Other Roles: The presiding bishop speaks and preaches at a wide variety of functions, provides hospitality on behalf of the church to visiting leaders, and serves as leader of organizations associated with the church, along with other duties not required by the Canons.

An Invitation to Discern

To submit a name for the JNCPB's consideration, please complete this form. The deadline for submitting names is **Saturday, July 15, 2023**, and the deadline for submitting application materials is **Tuesday, Aug. 15, 2023**.

JOINT STANDING COMMITTEE ON NOMINATIONS

Members

The Rev. Devon Anderson, Chair	Minnesota, VI	2024
Ms. Nanci Gordon, Vice-Chair	Vermont, I	2024
The Rev. Tracie Middleton, Secretary	Texas, VII	2024
The Rt. Rev. Kevin Brown	Delaware, III	2024
Ms. Wendy Cañas	New York, II	2024
The Rev. Canon Dr. Lynn A. Collins	Long Island, II	2024
The Rt. Rev. Gretchen Rehberg	Spokane, VIII	2024
The Rt. Rev. Audrey Scanlan	Central Pennsylvania, III	2024
Mr. Tieran Sweeny-Bender	Olympia, VIII	2024
Ms. Hanh Tran	San Diego, VIII	2024
Mr. Eddie Vance	Easton, III	2024
Ms. Delois Ward	North Carolina, IV	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	n/a
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	n/a

Representation at General Convention

Deputy Devon Anderson and Bishop Kevin Brown are authorized to receive non-substantive amendments to this Report at the General Convention

Acknowledgements

The Joint Standing Committee on Nominations wishes to thank the following people, who provided immeasurable support and assistance in our efforts to meet our mandate:

The Rt. Rev. Todd Ousley, Bishop for the Office of Pastoral Development, who provided insight and guidance in identifying bishop candidates for slates and conducting reference checks.

Jeremy Tackett, Senior Manager for Creative Services; Christopher Sikkema, Communications Project Manager; and Mike Collins, Director of Digital Communication; and others in the Office of Communications who worked tirelessly with our team to put together the informational videos.

Michael Glass, Mary Kostel, Kent Anker, and Christopher Hayes, who offered timely and needed advice along the way regarding JSCN mission, problem-solving, candidate questions, by-laws, and needed canonical fixes.

Report to the 81st General Convention

Brian Murray, Carrie Combs and others in the General Convention Office whose expertise made on-line applications and data gathering possible.

The professional translators who allowed us to communicate graciously with Episcopalians whose first language is Spanish by translating website content, application materials, and slate information from their English versions.

The following individuals who participated in informational videos are:

Executive Council: Timothy Gee, Scott Hayashi, Anne Hodges-Copple, Sandra Montes, Rachel Taber-Hamilton

Church Pension Group Board of Trustees: Ryan Kusumoto, Katherine McCormick, Mary Kate Wold

Board of Examining Chaplains: William Franklin, Hugh Page

Court of Review: Greg Jacobs, Laura Russell

Disciplinary Board for Bishops: Joseph Alarid, Gregory Jacobs, Chilton Knutsen

Joint Committee on the Nomination of a Presiding Bishop: Thomas Diaz, Lydia Kelsey Bucklin

Mandate

2022 - Joint Rules of Order V

1. There shall be a Joint Standing Committee on Nominations, which shall submit nominations for the election of:

- a. Trustees of The Church Pension Fund, serving as the Joint Committee referred to in Canon I.8.2.
- b. Members of the Executive Council under Canon I.4.1.d.
- c. The Secretary of the House of Deputies and the Treasurer of the General Convention under Canons I.1.1.j and I.1.7.a.
- d. Trustees of the General Theological Seminary.
- e. General Board of Examining Chaplains.
- f. Disciplinary Board for Bishops.
- g. Court of Review.
- h. The Joint Nominating Committee for the election of the Presiding Bishop.

2. The Joint Standing Committee on Nominations is composed of three Bishops, two Priests, one Deacon, and six Lay Persons. Members who are Priests, Deacons or Lay Persons must have served as Deputies to the most recent General Convention; once appointed, they will continue to serve as members of the Joint Standing Committee on Nominations through the next succeeding General Convention, regardless of whether they are elected as a Deputy to such General Convention, and until their successors are appointed.

3. The said Committee is instructed to solicit recommendations from interested organizations and individuals, to be considered by them for inclusion among their nominees.

4.

- a. For the elections of the Secretary of the General Convention, the Treasurer of the General Convention, and the members of the Court of Review, the Joint Standing Committee on Nominations will nominate a minimum of one nominee for each vacancy.
- b. For the election of the members of Executive Council and the Trustees of The Church Pension Fund, the Joint Standing Committee on Nominations will nominate a minimum of two persons for each vacancy.
- c. For all other elections other than those described in parts a. and b. of this Joint Rule, for which the Joint Standing Committee on Nominations will present nominees, it will nominate a minimum number of nominees equal to one and one-half times the number of vacancies.
- d. In all elections for which it will present nominees, the Joint Standing Committee on Nominations is charged with: (i) ensuring that the nominees for each position, and as a group,

as nearly as possible, represent the diverse constituencies of The Episcopal Church; (ii) obtaining biographical sketches with a facial image of all nominees, and (iii) reporting such nominations and sketches in the Reports to the next General Convention, otherwise known as the Blue Book.

e. This Joint Rule does not preclude further nominations from the floor made pursuant to separate rules adopted by either House of the General Convention.

5.

a. The Joint Standing Committee on Nominations, through the Office of the Secretary of General Convention, will secure background checks on its and any other nominees for Secretary of the General Convention, Treasurer of the General Convention, President of the House of Deputies, Vice President of the House of Deputies, Executive Council, and Trustee of The Church Pension Fund. These background checks will cover criminal records checks and sexual offender registry checks in any state where a proposed nominee has resided during the prior seven years, any appropriate professional licensing bodies with jurisdiction over a nominee's professional status and any violations of state or federal securities or banking laws. The records checks of proposed nominees from outside the United States will cover the same information from comparable authorities in the place of principal residence of the proposed nominee.

b. The required background check will be done prior to accepting a proposed nomination.

c. Background check results will be reviewed by the Office of the Secretary of General Convention. If that Office, after consultation with the Chief Legal Officer, determines that the results should preclude a person from holding the office sought, the Office shall share the determination with the proposed nominee and remit that determination, but not the background check results, to the nominating authority. Background check information shall not be shared beyond the Office of the Secretary of General Convention, the Chief Legal Officer, and proposed nominees who request their own information. The cost of background checks under this rule shall be covered by The Episcopal Church budget.

6. Any person desiring to be nominated from the floor of either House for any of the offices listed in Joint Rule V.5.a shall, at a time determined by the Office of the Secretary of General Convention, but no later than sixty days prior to the first legislative day of General Convention, submit the person's name and other necessary information to the Office of the Secretary of General Convention for the purpose of submitting to a background check in accordance with Joint Rule V.5.

Summary of Work

Meetings

The Joint Standing Committee on Nominations (JSCN) met in person on the following dates, both times at the Maritime Conference Center in Linthicum Heights, Maryland:

Monday, November 14 – Wednesday, November 16, 2022

Monday, October 9 – Wednesday, October 11, 2023

In addition, the full committee met via Zoom on December 13, 2022, and in 2023 on: January 18, February 14, March 23, April 19, May 23, September 7, and November 12 in addition to countless subcommittee Zoom meetings.

Process

Our process (detailed below) consisted of: Mandate clarification, developing job descriptions, education, applicant recruitment, development of on-line application materials, gathering references, and candidate selection and notification.

Mandate Clarification

Together the JSCN reviewed its canonical mandate in addition to resolutions from the 80th General Convention (A016, A118, and A124). A016 and A124 amended the Joint Rules of Order to lower the number of nominees required for each slate. A118 amended the canons regarding nomination process and number of candidates required for Court of Review. From these resolutions and the existing canons the JSCN derived its mandate for each slate.

Creating confusions were actions of the 80th General Convention that changed the nature of the Board of Trustees for General Theological Seminary without changing some parts of the Joint Rules of Order or related canons to reflect the change. Though the JSCN no longer needed to present a slate of nominees to the 81st General Convention, the canons still reflected creating a slate of nominees for General Theological Seminary as part of the JSCN's mandate. JSCN approached Christopher Hayes, Chair of the Standing Commission for Governance, Structure, Constitution and Canons. JSCN was advised that not changing the JSCN mandate in relation to General Theological Seminary was an oversight, and the JSCN were asked not to present a slate for General Theological Seminary Board to the 81st General Convention. The JSCN formally asked the Standing Commission on Governance, Structure, Constitution and Canons to “clean up” the canons and Joint Rules of Order as they relate to the General Theological Seminary board by resolution to the 81st General Convention.

Job Descriptions

JSCN spent considerable time consulting with existing and previous members of Executive Council, Church Pension Group Board, Court of Review, Disciplinary Board for Bishops, General Board of Examining Chaplains, and Joint Nominating Committee for the Election of a Presiding Bishop in order to update job descriptions for each committee. JSCN's intention was to provide accurate, current, and exhaustive descriptions to equip the discernment of prospective applicants.

Education/Videos

In an attempt to better describe the work of each committee, the JSCN produced videos in which members of the existing groups were interviewed by JSCN committee members. Videos discussed the scope of work, time-commitment, mandate, as well as skills and experience needed for successful membership. The Episcopal Church Office of Communications staff assisted with all technical aspects of the project with enthusiasm and intentionality. Completed videos were posted on the website, disseminated across the church through Episcopal News Service and Episcopal Church social media, and were included with application materials.

Applicant Recruitment

This JSCN had a deep desire to expand the participation in the councils of the church to a wider applicant pool – including younger generations, people of color, and leaders with the needed skills who had never before put themselves forward for leadership beyond their congregation or diocese. Much strategic effort was put into equipping the wider church to put others forward for consideration. The JSCN published an on-line referral form where Episcopalians could refer a prospective applicant to the JSCN. Once received, the JSCN was then able to reach out to the prospective applicant letting them know they had been referred and sending them information to assist with their discernment (job description and video), plus the application form. JSCN's efforts were rewarded, as many applicants entered the process through a referral system.

Further, the JSCN consulted throughout the church with affinity and advocacy groups, ministry networks, General Convention deputies past and present, and members of interim bodies asking for referrals from within their ranks. An added bonus of this both expansive and relational approach was increased visibility both for the nominations process, and for the ministry of the six committees.

Application Materials

Application materials were entirely on-line and professionally translated by the Translation Ministry Office of the Episcopal Church. Applicants were able to apply for more than one committee using a single form.

References

The JSCN spent the summer months of 2023 contacting two references for each applicant and conducting in-person interviews. Questions asked of references were uniform and submitted online by JSCN members. The JSCN is incredibly proud to have completed approximately 250 reference interviews – two for every applicant, and to put forth slates in which every single nominee received two reference checks.

Selection & Notification

Following the JSCN in-person meeting in October 2023, applicants nominated for a place on a slate were contacted and congratulated. Nominees were again asked if they still wanted to be a nominee, as the duration between application and selection was approximately seven months. Applicants who were not nominated were also promptly notified and offered a discussion with the JSCN Chair as to how they could strengthen their application should they decide to apply next triennium. Again, the hope was to encourage and support emerging leaders and plant the seeds to expand access to leadership.

Pilot Project: Bishop Nominations Process

Recruitment of bishops was handled with specific intentionality in this cycle, with excellent results. This was the method:

A few weeks prior to the House of Bishops' spring meeting, the three bishops on the committee (the Rt. Rev. Audrey Scanlan, the Rt. Rev. Gretchen Rehberg, and the Rt. Rev. Kevin Brown), along with the JSCN Chair and the Secretary, organized a brainstorming session, consulting with the Rt. Rev. Todd Ousley, Bishop in the Office of Pastoral Development and the Rt. Rev. Sean Rowe, Parliamentarian for the House of Bishops and Bishop in Northwestern Pennsylvania and Western New York. The brainstorming session yielded an initial list of bishops considered most likely to be qualified, interested, and potentially available, to run for each of the six groups for which nominees were sought.

Bishop Scanlan then sent an email to each bishop thus identified, inviting them to prayerfully consider applying, noting that the bishops on the committee would follow up during the spring meeting. The timing of these invitations was likely the most important factor in the success of this approach. Follow-up during the bishops' spring meeting provided a personal, focused opportunity for discernment, right at the beginning of the application period, which was well received and effective.

The bishops, Chair, and Secretary provided application materials to those who indicated interest, then tracked the submissions of those anticipated applications, as well as other bishop applications. Members of the bishop recruitment project group met a few more times by Zoom to

generate additional names and coordinate follow-up. As a result, the bishops were the first order, rather than the last, to reach the required minimum number of applicants to produce a full slate for their order.

Following up the application process, each bishop's reference checks were augmented by contacting the President of the Standing Committee of that bishop's diocese for an additional reference.

Two additional factors improved bishop recruitment. The resolution passed by the 80th General Convention to reduce the total number of nominees required for certain slates helped, particularly for groups requiring a large number of bishops.

A change to the application form also made the process smoother. Since all letters of good standing for bishops come from the Presiding Bishop's office, the committee requested those for all bishop applicants in a single batch rather than each bishop requesting and sending theirs separately.

Recommendations

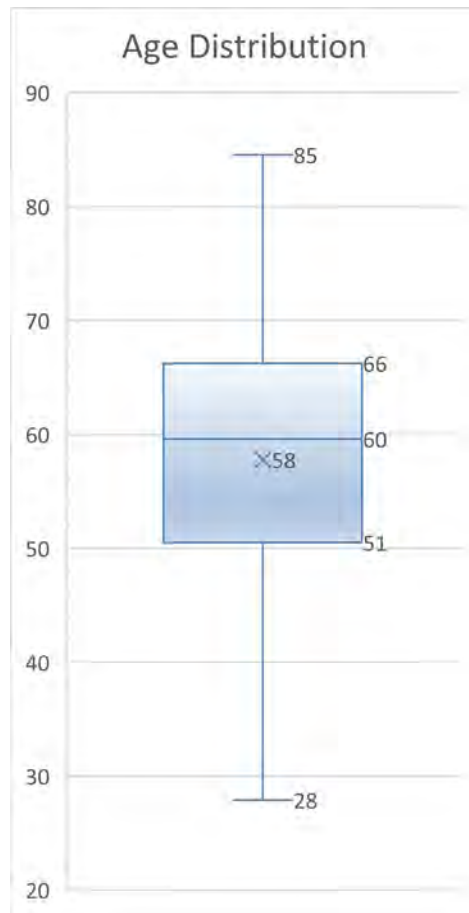
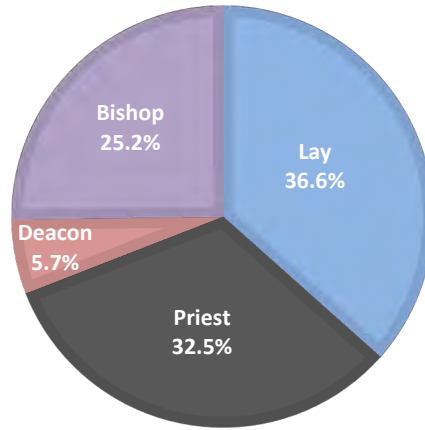
The JSCN sought to deepen the process of compiling slates for consideration at General Convention, and to share our learning and recommendations with the wider church and the next iteration of this group. The Commission's intent was to build on the administrative resources from prior JSCNs, and to add our own unique contributions for the betterment of the continuing process of raising up new and emerging leaders. To this process we added an intensity around referrals and education (videos) as well as a relational approach, leaning on in-person conversations rather than attempting this relational work on e-mail or text. Going forward, we recommend the following to the next JSCN:

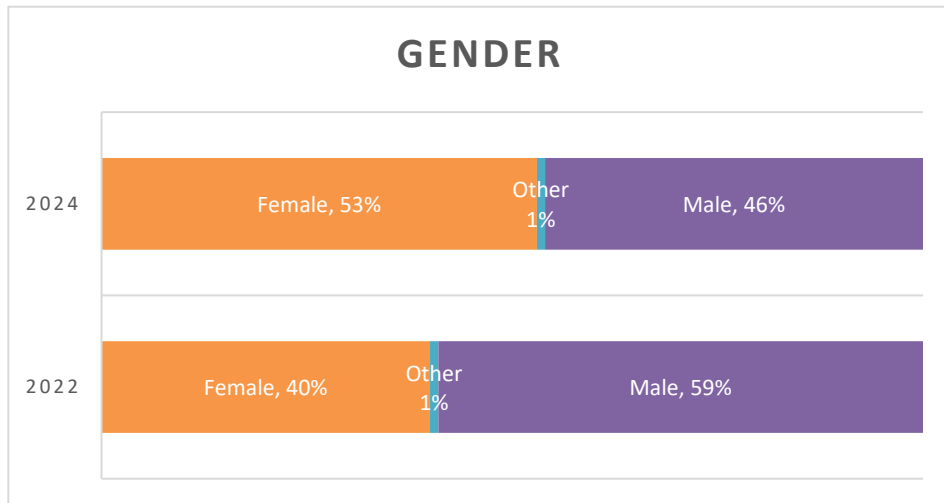
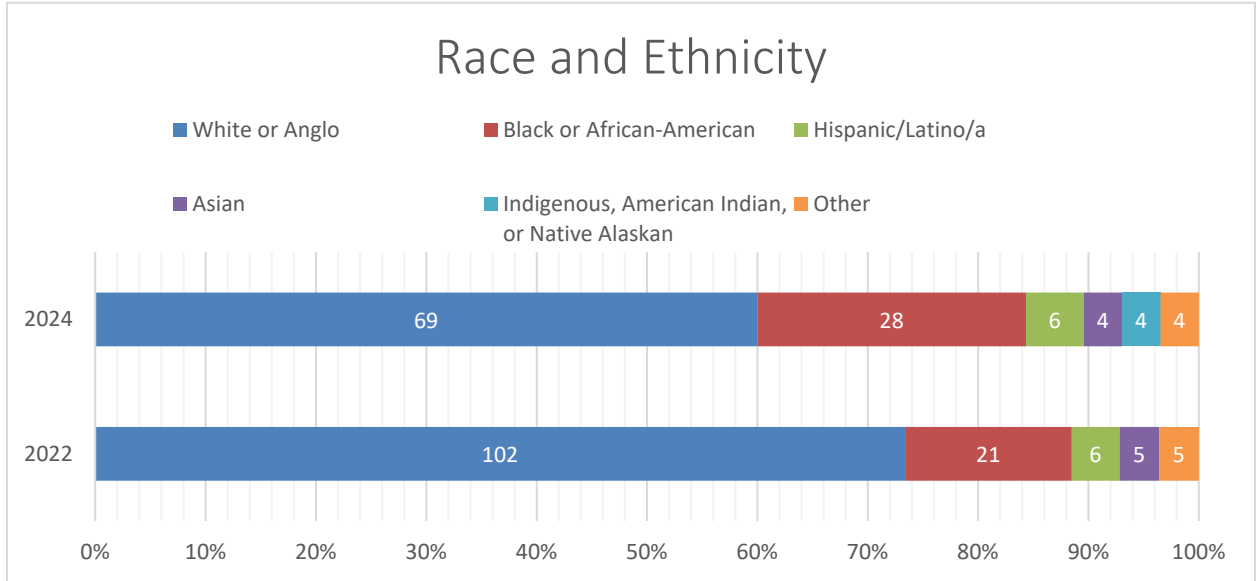
- 1) The "Bishop Track" pilot project was, in the JSCN's opinion, a huge success. By the time the JSCN gathered in-person to select slates, the bishop slates had been filled for over a month, ready for committee discussion. This process produced 100% of the needed bishop candidates well before the rest of the slates were completed. We suggest the next JSCN utilize this process and improve upon it.
- 2) Several seminarians applied for a slate, but the JSCN failed to include a place on the application to indicate whether or when they might anticipate a change in order of ministry.
- 3) The next JSCN might want to research whether or not there is a potential conflict of interest for a candidate to serve on both the Disciplinary Board for Bishops and the Court of Review at the same time.
- 4) The JSCN plans to compile a manual to give future JSCNs, one that includes process, timing, wording, sample press releases and communication to applicants, and strategy for

- recruiting applicants and expanding access to people of color, younger generations, and LGBTQ+ Episcopalians. The idea is that the manual would be improved each triennium by each JSCN's experience, learning, and expertise – so that this process gets better, more faithful, and more expansive over time.
- 5) A question we did not resolve is whether or not JSCN members should themselves be eligible for nomination on slates themselves. The JSCN did not achieve consensus on this question, and leave it for future consideration, in consultation with the Presiding Officers.
 - 6) More work can be done to be inclusive to differently-abled people as applicants and nominees. Towards the end of our process, we realized that we had failed to request (voluntary) demographic data regarding the disability status of applicants for churchwide positions. Over the past half century-plus, the Episcopal Church has sought better representation of the diversity of our Church, being mindful of provincial representation, gender, race, ethnicity, age, sexual orientation, gender identity and expression—but to date, we have not been mindful of the disability status of our applicants. Among the other (confidential) demographic information we request of applicants, we recommend that future Joint Standing Committees on Nominations include asking “Do you identify as a person living with a disability?” as a way to help us better include our siblings living with disabilities in the decision-making of The Episcopal Church.
 - 7) Finally, much consternation went into presenting a full slate for the General Board of Examining Chaplains. The JSCN's mission is to nominate specified numbers of lay people, clergy, and bishops, in addition to seminary faculty. With the decreasing number of dioceses utilizing the General Ordination Exam and so many of our seminaries in flux, locating Episcopalians both qualified and willing to serve proved onerous. We are not the same church we were when these numeric expectations for GBEC candidates were deployed into our canons. Extensive effort was invested by the JSCN over a full calendar year as far as recruitment, discernment, and invitations to apply. The JSCN has submitted a resolution asking the Standing Commission on Structure, Governance, Constitution and Canons to research the current level of need for the General Board of Examining Chaplains and propose adjustments in its make-up and numbers to better align with that need.

Statistics

ORDER OF MINISTRY





Proposed Resolutions

A068 Amend Joint Rules of Order V.1

Resolved, That the 81st General Convention amend Joint Rules of Order V.1 as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Joint Rule V.1

1. There shall be a Joint Standing Committee on Nominations, which shall submit nominations for the election of:
 - a. Trustees of The Church Pension Fund, serving as the Joint Committee referred to in Canon I.8.2.
 - b. Members of the Executive Council under Canon I.4.1.d.
 - c. The Secretary of the House of Deputies and the Treasurer of the General Convention under Canons I.1.1.j and I.1.7.a.
 - d. General Board of Examining Chaplains.
 - e. Disciplinary Board for Bishops.
 - f. Court of Review.
 - g. The Joint Nominating Committee for the election of the Presiding Bishop.

<Proposed amended resolution text showing exact changes being made:>

Joint Rule V.1

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

~~f~~-e. Disciplinary Board for Bishops.

~~g~~ f. Court of Review.

~~h~~ g. The Joint Nominating Committee for the election of the Presiding Bishop.

EXPLANATION

In 2022, the 80th General Convention passed Resolution A139 which allowed the Board of Trustees of the General Theological Seminary to amend the constitution of the seminary without the consent of the General Convention. The Constitution of the General Theological Seminary was amended in 2022 to remove the General Convention's role in appointing trustees to the board of the seminary. By removing the requirement that the Joint Standing Committee on Nominations nominate seminary trustees, this resolution brings the Joint Rules of Order into alignment with the current constitution of the seminary.

A069 Amend Joint Rules of Order V.4.c to fix a rounding error

Resolved, That the 81st General Convention amend Joint Rules of Order V.4.c as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Joint Rule V.4.c

c. For all other elections other than those described in parts a. and b. of this Joint Rule, for which the Joint Standing Committee on Nominations will present nominees, it will nominate a minimum number of nominees equal to one and one-half times the number of vacancies, rounding up to the nearest whole number as needed.

<Proposed amended resolution text showing exact changes being made:>

Joint Rule V.4.c

c. For all other elections other than those described in parts a. and b. of this Joint Rule, for which the Joint Standing Committee on Nominations will present nominees, it will nominate a minimum number of nominees equal to one and one-half times the number of vacancies, *rounding up to the nearest whole number as needed.*

EXPLANATION

In 2022, the 80th General Convention passed Resolution A106 which lowered the number of nominees per vacancy required to be nominated by the Joint Standing Committee on

Nominations. In the course of our work this triennium, the Standing Committee realized that for positions with an odd number of vacancies, nominating nominees equal to one and one-half times the number of vacancies would require nominating fractions of a person, and the Committee deemed it un-Christian to follow procedures requiring chopping people into fractions. This resolution clarifies the Joint Rules of Order and offers the Committee a procedure for nominating nominees in a non-violent manner.

A070 Research needs for the General Board of Examining Chaplains

Resolved, That the 81st General Convention direct the Standing Committee on Structure, Governance, Constitution and Canons to research the current level of need for the General Board of Examining Chaplains and propose adjustments to its make-up and membership to better align with that need.

EXPLANATION

Much consternation went into presenting a full slate for the General Board of Examining Chaplains over the biennium (2022-24). The Joint Standing Committee on Nomination's mission is to nominate specified numbers of lay people, clergy, and bishops to the General Board of Examining Chaplains, in addition to seminary faculty. With the decreasing numbers of dioceses utilizing the General Ordination Exam and so many of our seminaries in flux, locating Episcopalians both qualified and willing to serve proved onerous. The Episcopal Church is not the same church it was when these numbers and expectations were deployed into the canons. Extensive effort was invested by the JSCN over a full calendar year as far as recruitment, discernment, and invitations to apply. While it was able to meet its mission, the JSCN feels it is past time to reassess the composition, membership, need and role of the General Board of Examining Chaplains and to entertain creative options for locating qualified applicants.

Slates

Executive Office of the General Convention

TREASURER OF THE GENERAL CONVENTION

This is a three (3) year term. The House of Deputies elects this position; the House of Bishops confirms this election.

N. Kurt Barnes

Lay

New York, NY

New York, II

Grace Millbrook

I have served effectively and efficiently as GC Treasurer, EC Treasurer, an FMS Chief Financial Officer for 19 years, working with many members of church governing bodies, under varying economic and political climates. I have assumed operational management responsibilities during extended vacancies in other C-Suite positions.



I assumed responsibility and transformed the Office of Development into a successful operation that has helped TEC and church-affiliates. During the first 14 years, my job as Treasurer and Chief Financial Officer was managing and conserving assets. I suspect that Presiding Bishop Curry decided I could have a deeper appreciation for asset management if I also had the challenge of asset gathering – fundraising.

I served as a senior officer at a global mining company and at a global vestment firm with responsibility for financial and investment management and legal filings worldwide.

The Church Pension Fund Trustees

TERM OF OFFICE: 6 years

NUMBER OF TRUSTEES TO BE ELECTED: 12

BACKGROUND ON THE CHURCH PENSION FUND

The Church Pension Fund (CPF) is a financial services organization that serves the Episcopal Church. CPF and its affiliated companies, collectively referred to as the Church Pension Group (CPG), maintain three lines of business—employee benefits, property and casualty insurance, and publishing. They provide retirement, health, life insurance, and related benefits for clergy and lay employees of the Episcopal Church, as well as property and casualty insurance, and book and music publishing, including the official worship materials of the Church

POSITION DESCRIPTION FOR TRUSTEES Trustees are elected by General Convention to serve on the Board of Trustees of CPF (CPF Board) for 6-year terms. The CPF Board is comprised of 25 trustees, of which 24 are elected by General Convention and one is CPF's Chief Executive Officer. In addition, each trustee typically serves on two of the six committees of the CPF Board. Legally, the CPF Board is the board of directors of CPF, a New York not-for-profit corporation, and as such plays a critical role in governance and oversight of the work of the companies that comprise CPG. Among other things, the CPF Board makes policy decisions that affect CPF's investment strategy and policy, and the pensions and other benefits and services that CPG offers.

COMPETENCIES & QUALITIES The CPF Board needs trustees who have expertise and experience in areas of business similar to CPG's principal businesses (e.g., investments, pensions, employee benefits, insurance, healthcare, and publishing) and relevant skills (accountants, attorneys and other business and financial professionals), as well as familiarity and experience with the Church. In addition, the CPF Board values diversity (broadly defined) among its trustees. Trustees must also have computer literacy and internet access.

Report to the 81st General Convention

Elect: 12 Trustees. **Slate Needs Minimum of: 24 Nominees**

HoD elects all; HoB affirms HoD election

Name	Order	Name	Order	Name	Order
Dwight Babcock (IV SW. Florida)	Lay	Michael Barlowe (VIII California)	Priest	Austin Rios (II Europe)* ****	Bishop-elect
Samuel Bonsey (II Europe)	Lay	Sam Candler (IV Atlanta)*	Priest	Diana Akiyama (VIII Oregon)	Bishop
Billy Boyce (I Massachusetts)	Lay	Tracy Johnson Russell (I Connecticut)	Priest	Kevin Brown (III Delaware)	Bishop
Sharon Brown- Veillard (II Long Island)	Lay	Geoffrey Smith (I New Hampshire)	Deacon	Susan Brown Snook (VIII San Diego)	Bishop
David Heywood (III Washington)	Lay	Luis Lopez (IX Colombia)	Priest		
Esslie Hughes (II New York)	Lay	Matthew Mead (II New York)	Priest		
Zena Link (I W. Massachusetts)	Lay	Michael Molina (III Bethlehem)***	Deacon (Transitional)		
Yvonne O'Neal (II New York)*	Lay	Landon Moore (II Long Island)	Priest		
Samuel Reckford (II Newark)	Lay	Leon Sampson (VIII Navajoland)	Priest		
Linda Watt (IV W. N. Carolina)*	Lay	Denise Stahura (VI Minnesota)	Priest		
		Molly Weiss (VI Minnesota)	Priest		

* Incumbent running for re-election

*** Candidate's order of ministry has changed

**** Candidate on slate to be released in supplementary report pending receipt of consents to election to become Bishop of California

Dwight Babcock

Lay
Marco Island, FL
St. Mark's,
West Florida, IV



I serve as the Diocesan Administrator and CFO for a two-state diocese with 60+ congregations, as well as multiple schools and agencies. The one common denominator that effects their sustainability is affordability; "help us find ways to afford full time clergy, reduce the costs of escalating property and casualty insurance expenses, and find affordable healthcare options". Additionally, I routinely consult with churches regarding planned giving initiatives and stewardship programs. I work with clergy and lay employees regarding their pensions and retirement and consult with vestries regarding their concerns about their endowments and healthcare choices. I served on the CPG Client Counsel for four years and built relationships with a diverse group of colleagues across the church sharing our insight into our challenges. On the CPG Board, I would continue to bring my experiences to bear to ensure all Episcopal churches can better navigate the ever-changing church landscape.

Samuel Bonsey

Lay
Paris, France
American Cathedral of Paris
Convocation of Episcopal Churches in Europe, II



I want to help the Church Pension Fund invest for positive impact. My career in finance is committed to building the field of responsible, sustainable, impact investing. In my role as Executive Director of The ImPact (www.theimpact.org) I support values-driven investors in reconciling their sacred intentions with the profane realities of our global financial system. As a young professional, I feel an urgent and joyful call to assist CPF in pursuing a higher, clearer (dare I say, bolder) example of faith-based investing. Together, we can address and repair The Episcopal Church's profiteering from economies based upon enslaved labor. Exploitative or extractive wealth accumulation and inequitable wealth distribution haunt the church's ongoing participation in the financial system, as exemplified in disparities between clergy and lay pensions. My hope and prayer is to support CPF efforts to build the Beloved Community through more just and equitable investment practices.

Billy Boyce

Lay
South Bedford, MA
Grace Church
Massachusetts, I



As a follower of Jesus, a Certified Public Accountant, and a financial services professional with PricewaterhouseCoopers, I strongly believe in the trust and faithful service of the Church Pension Fund. Centering the sustainability of the fund and its ability to serve current and future leaders of our beloved Episcopal Church. Having worked as a trusted advisor to CEOs, CFOs, and boards of directors, with clients across various industries, I will bring my business background to serve as fiduciary to the fund. While growing in my professional career I've continued to serve the church in local, diocesan, and church-wide positions. With that experience, I bring with me the stories and perspectives of the clergy and laity most impacted by the fund. I would be humbled and honored to serve as a Trustee of the Church Pension Fund.

Sharon Brown-Veillard

Lay
Brooklyn, NY
St. Alban's Carnasie
Long Island, II

My faith has always ordered my course in life, and I have used my talents to make meaningful contributions to the Church and the wider community. As a tax attorney for 25 years, I specialize in public finance and my primary focus involves assisting state and local governmental entities in raising funds through the issuance of municipal bonds in the capital markets. My diverse background includes proficiency in finance (BS), tax (MS and LL.M), and the law (JD) and I understand the importance of sound investments, diversification, and risk management. I currently serve as the Chair of Dispatch of Business for the Convention for the Diocese of Long Island, a position I have held for the last 10 years. I service as the chairperson and treasurer, respectively, on two not-for-profit boards. I will bring to the Board my keen eye for due diligence and will be a vocal advocate for transparency and accountability while acting in the best interests of the beneficiaries of the pension fund.

David Heywood

Lay
Gettysburg, PA
St. Francis
Maryland, III



I retired from 38 years' practicing law in tax, employee benefits, corporate transactions, and finance. I practiced in a national law firm and corporate executive positions with demonstrated commitment to diversity and disadvantaged communities; represented charities; and served for 12 years on a major corporation's pension appeals board.

My mother, a pioneer as the first female senior warden in the Diocese of Ohio, inspired me to serve the church. I served as search committee chair, junior & senior warden, and Finance chair at St. Francis, Potomac MD and Church of the Mediator, Allentown PA; Diocesan Trustee in the Diocese of Bethlehem; United Way board and distributions chair; and on the Washington diocesan lawyers' guild assisting the COO and parishes in obtaining PPP loans during Covid. Also served as board chair of St. Francis Episcopal Day School and St. Andrew's Episcopal School.

I hope to use this experience to ensure strong church benefits programs for generations.

Esslie Hughes

Lay
Hoboken, NJ
St. Bartholomew's
New York, II



A graduate of Wesleyan University and the University of Chicago Booth School of Business, I am a strong, respected leader driven by an enduring interest in leadership, ethics, and in mentoring and developing leaders. I have been fortunate in senior roles at The Bank of New York, the Public Company Accounting Oversight Board (PCAOB), and in recent years at The Episcopal Diocese of New York, to have acquired extensive management, financial, governance, and operations experience. As an ex-officio member of the Diocesan Board of Trustees, I also serve as staff liaison to the Investment, Finance, Budget, Audit, and Risk Management Committees, among others. I hope my experiences listed above, and as a member of a number of other nonprofit boards including Episcopal Divinity School and the Episcopal Church Building Fund, can be leveraged to help guide the Church Pension Fund to continued excellence and living into best practices, in order to support the broader mission of the church.

Alexizendra Link

Lay
Waltham, MA
St. Luke's
Western Massachusetts, I



My name is Alexizendria (Zena) Link. I am uniquely qualified to serve on the Church Pension Fund Board of Trustees through my religious, academic and leadership experience. In addition to graduating from divinity school, I've served in numerous capacities throughout the church. Through my faith, training and ministry, I've become a successful facilitator, public school educator and strategist for community and national organizations committed to social justice and improved educational services that strive for the humanity of all. I've embodied and utilized those skills on various Episcopal boards and committees for over a decade. If elected, I would bring an intersection of competencies from previously serving on The Executive Council's finance committee, The Diocese of Western MA Board of Trustees, two Program, Budget and Finance (PB&F) committees and the investment committee for the Massachusetts Teachers Association. Thank You in advance for your consideration.

Michael Molina

Lay
Temple, PA
Trinity Church
Bethlehem, III



My work in the military, the US Government, the civilian sector, for non-profit organizations, and in the Episcopal Church have prepared me for this position. I was a Chaplain Assistant in the US Army Reserve, worked in for statistical agencies of the US Federal Government, served on the board of 2 non-profit organizations, worked for a document firm with corporate and federal government contracts, and served in the Episcopal Church as a vestry member and music director. I have degrees in Human Services and Theology. My combination of education and experience make me a well-rounded candidate, capable of working under pressure and discerning solutions to complex issues -- all while remembering Christ and his faithful people in my service.

Yvonne O’Neal

Lay

New York, NY

Church of the Holy Trinity

New York, II



I am a dedicated, accomplished financial professional with extensive experience in financial services and expertise in retirement savings and pensions, insurance, and investments. I am a faithful layperson and have been in leadership roles in the Episcopal Church since I was a teenager. I have the privilege of serving on The Church Pension Fund Board of Trustees (CPF Board), where I am vice chair of the Audit Committee. I am very active in social justice matters and I bring these matters in our CPFBoard discussions. I look at the totality of our corporate strategy through the lens of the 17 sustainable development goals(SDGs) which represent our vision for the care of creation. The SDG's work emphasizes protecting our planet's resilience. I believe my extensive experience in financial management will help our Church maintain its strong financial position to accomplish our goals today, and for the longer term. I would be honored to continue to serve.

Samuel Reckford

Lay

Short Hills, NJ

Christ Church, Short Hills

Newark, II



With decades of both financial and board experience, I could be useful to the CPF Board. My first career was as a risk executive at a major investment bank, where I served for 17 years on the Global Credit Risk Committee in addition to serving on various industry-wide risk management committees. Since retiring from Wall Street, I have served in two CFO roles, including at the Diocese of Newark since 2017. Outside of work, I was Board President at a top NJ private school for 18 years and spent the last 7 years on the board of Stevens Tech, where I am Audit chair and Investment vice-chair. I was also Warden of my church and have served 25 years on its investment committee. Through these experiences I have refined my finance, risk, audit and investment expertise while studiously observing and practicing board participation and leadership skills. I believe that my professional skills combined with my love of the Episcopal church and desire to contribute would be an asset to CPF.

Linda Watt

Lay

Weaverville, NC

Trinity, Asheville

Western North Carolina, IV



I am enthusiastically seeking a second term as a trustee of the Church Pension Fund. As a trustee, I have focused on risk mitigation, especially on cyber risk. I also give special attention to lay issues, especially regarding financial health, assuring that these are addressed proactively, transparently, and creatively.

As the Church's former Chief Operating Officer and a public sector executive I bring a solid background in finance. As a trustee, a deputy, and through diocesan and church-wide committees, I have a broad understanding of Church needs and a deep respect for our clergy and lay employees. I am attuned to our non-US dioceses from my many Foreign Service years in Latin America. I am foremost a listener who takes all viewpoints into consideration in decision-making. I aim to be a hard-working and thoughtful voice working on behalf of all CPG clients, grounded in my Christian faith and the values of the Episcopal Church.

Michael Barlowe

Priest

New York, NY

Grace Cathedral, San Francisco

California, VIII



General Convention's wisdom in creating the Church Pension Fund (CPF) has supported the church's ministries for generations. My relationship with the Church Pension Fund (CPF) goes back 40 years, first as a clergyperson and as a clergy spouse. For ten years, I was a diocesan executive who advised lay and clergy leaders about CPF assessments, pensions, health insurance, and property insurance.

Most recently, as an officer of The Episcopal Church, I have conferred regularly with CPF senior management in such churchwide concerns as lay pension enhancement and parity, church data analysis, and pensions for Cuba. I have convened or served on the several bodies of Executive Council, called for originally by General Convention, to strengthen understandings of CPG's shared goals.

As a trustee, I would bring all this experience to the board, as well as my background as a banker; many years of developing and overseeing multi-million-dollar budgets; a knowledge of the regulatory and legal context in which CPF operates; and a profound commitment to continuing the Church Pension Fund's distinguished role in furthering God's mission through The Episcopal Church.

Sam Candler

Priest

Atlanta, GA

The Cathedral of St. Phillip

Atlanta, IV



Thank you for an opportunity to continue serving as a trustee of The Church Pension Fund. I grew up in a small Episcopal Church in Georgia, went to California for college and to Connecticut for seminary; I have taught as an adjunct professor at Emory University. I am glad to be a seasoned priest who has served parishes in three different dioceses. Presently dean of St. Philip's Cathedral, Atlanta, I advocate that strong parishes, small and large -and their leaders, lay and ordained-are the future of the church. I enjoy raising up integrity, energy, and health; and I want to represent those values in meeting the pension fund challenge of growing lay pension benefits. I have served on many school boards, and, in South Carolina, on the Governor's Commission on Race Relations. I am a deputy to General Convention, committed to caring for the details of our wider church life. I hope to help the pension fund steward the generous spirit of Anglicanism as a gift to the world!

Tracy Johnson Russell

Priest

Bethany, CT

St. Monica's, Hartford

Connecticut, I



The skills, competencies, and experiences that have prepared me to offer myself to service on this body come specifically from my lived experience and ministry in bi-vocational, full-time, and secular contexts. I have served in many roles in these contexts: Director of HR, Rector, Chaplain, Chair of a Corporation, Property Manager, Founder and Executive Director of a non-profit, and fund developer. I served as President of the Standing Committee, along with a variety of other leadership roles in my diocese. I also have leadership and teaching roles at two theological institutions: Berkeley Divinity School at Yale Divinity School and Hartford International University. The most important lesson that I have learned through my varied experiences is that practicing good, equitable and faithful stewardship of the resources we have been given is good and holy work. And I will bring this orientation and grounding into my work and ministry as a member of the CPG Board of Trustees.

Luis Lopez

Priest

Cali, Valle del Caluca

Trinity Church

Colombia, IX



I am a married priest and father of two beautiful children; I serve with joy in the Diocese of the Episcopal Church in Colombia, convinced to bring the Good News of salvation to all people, especially those who are on the fringes of society. The congregation I serve as vicar is the Trinity Church Parish in the city of Cali, Colombia. I pastorally encourage my parish and I oversee the management of the Church's properties in the city of Cali. I am a theologian by profession and I enjoy reading. I have served my Diocese in different capacities: President of the Standing Committee, member of the Ecclesiastical Discipline Committee, and Chaplain of Public Relations. I enjoy my ministry and spending time with my family. In my spare time, I play sports.

Matthew Mead

Priest

Pelham, NY

Parish of the Redeemer

New York, II



I am a husband, father, priest, and rector. I love Jesus Christ, I grew up in the Episcopal Church, I have been serving parishes and the wider church as a priest for 19 years, and I hope to continue active ordained ministry for another 20 to 25 years. I currently serve the Diocese of New York as a Trustee, as Chair of the Real Estate Committee, on the Finance Committee, the Canons Committee, and the Commission on Ministry, and I served as Chair of the Budget Committee for the past decade. I also served as Deputy to General Convention in 2022 and 2018, as Alternate in 2015, as Chair of the 2022 Legislative Committee for Stewardship & Socially Responsible Investing, and as Secretary for the Task Force on Liturgical & Prayer Book Revision. Sustainable and sound oversight of the Church Pension Fund matters to me personally and for the whole church. I believe I have the skills and experience to serve on and be of service to the Church Pension Fund Board. I offer myself for consideration.

Landon Moore

Priest
Brooklyn, NY
St. George's
Long Island, II



Currently, I serve as Priest-in-Charge at Saint George's Episcopal Church in Brooklyn. I have gained skills in creating streams of passive income for the ministry of the parish that is not the normal pledge and plate. Some examples of my innovations have been, renovating unused space into apartments, creating an endowment, and other ministries that are financially self-sufficient; so that Saint George's will continue to be a beacon for the ministry of Jesus Christ in the community of Brooklyn. I bring experience as a self-published author with an interest in the publishing mission of CPG to help Church publications become more accessible for writers. I do believe in the financial security of CPG for the retirement of its employees. However, I come ready for conversations about the future of the church and how CPG can add to those financial opportunities. I hope to use my gifts to add to the mission of the church and to provide direction to the Pension Fund.

Austin Rios

Bishop-elect
Rome, Italy
St. Paul's Within the Wall
Convocation of Episcopal Churches in Europe, II



Six years ago, I was elected to serve as a Trustee and would be honored to do so once more. As Rector of a multilingual and multicultural church outside the United States, I offer an international perspective for CPG's work of serving the wider church with integrity. While I am proud of the work we have accomplished-including helping dioceses and churches navigate the difficulties of COVID, providing better Medicare options for our clients, and for the exemplary investment stewardship of these years-some of the most important work we've done has been to focus on Diversity, Equity, and Inclusion throughout all levels of the organization. I've been privileged to add my voice to these hard, but necessary conversations, and to witness all the ways that our DEI work is helping shape CPG into a more beloved, professional, and compassionate community. I currently serve as Vice Chair of the Investment Committee.

Leon Sampson

Priest

Fort Defiance, AZ

The Good Shepherd Mission

Navajoland, VIII



I serve in a community that is limited by the options of proper health care benefits, as I am part of a high populated tribal entity but have major restrictions to health care and wellness benefits. The history of wellness for my "dine'" Navajo people have not always been supported by wholehearted and well intentions of a nation. Still today the health care and wellness system have flaws that allows individuals such as me to slip through the cracks of getting adequate health care and wellness services. A larger issue of selfcare among our community has always left our leadership to fend for themselves when it comes to answering God's call to serve the communities that surround us.

Geoffrey Smith

Deacon

Etna, NH

St. Barnabas

New Hampshire, I



The CPF management team has recently said the consequences of climate change are having a strategic impact on their subsidiary, Church Insurance Company. As a deacon for 27 years now serving in the Diocese of New Hampshire and Vermont, most of my working career was in the field of property / casualty insurance and risk management. I worked as a casualty underwriter for 3 years before completing an MBA in Finance at DePaul University. For the next 35 years I served in leadership roles in risk management for some of America's largest companies, where I had direct responsibility for the corporate insurance programs, as well as loss prevention, claims management and risk financing.

This experience will enable me to be an effective Board member and advocate for TEC. I would welcome the opportunity.

Denise Stahura

Priest
St. Paul, MN
St. Clement's
Minnesota, VI



Before I was ordained, I spent 30 years working in finance and strategic planning for Fortune 500 companies, including U. S. Bank and Pillsbury, and for non-profits, including Greater Twin Cities United Way. I managed a portfolio of services with million dollar budgets and charted the strategic planning for a \$20 million non-profit.

When discerning for the priesthood, I told my bishop that I enjoyed finance but didn't know what use it would be to God as a priest. He assured me that the "church needs people like you." Having worked in both the for- and non-profit arenas, I know that budgets and investment strategies reflect the priorities of an institution. Investment strategies that support social justice, earth care, and diversity are important indicators of a Church in God's world.

Molly Weiss

Priest
Oakdale, MN
Christ Episcopal Church, Woodbury
Minnesota



I have worked in the field of corporate and non-profit Human Resources for over 23 years, including the design and management of benefit, retirement and compensation plans. My HR experience also covers leading employee engagement and Diversity, Equity and Inclusion, which I seek to infuse into all that I do. In addition, I have served as the Chair of the Diocese of Minnesota's Personnel Committee for 3 years. As part of this committee, I led a team of dedicated people to revision and recraft both our overall employment policy handbook, and our compensation structure and guide. These experiences gave me a deep appreciation for the balance between policy and the practical application of that policy as well as the needs of faith communities and employees. As I do in my ministry as a priest, I seek to enrich the corporate world with the Spirit, and the Church with learnings from my practical experience.

Diana D. Akiyama

Bishop
Portland, OR
Oregon



My competencies and skills relevant to serving on the Church Pension Fund Board are centered in strategic thinking focused on informed projections about the road ahead. Our current environment of accelerated change demands financial leadership that will be critical for the longevity of our mission and ministry in our diocese. Currently, we are working to restructure the financial model for our diocese as we anticipate diminishing numbers of faith communities and an increase in requests for funds to support our ministries across the diocese. As one of four dioceses selected as pilots for the ECF Diocesan Vitality Initiative, we are undertaking a 360 assessment of our diocesan assets focusing on spiritual and ministry vitality as well as financial sustainability. Alongside this work, we have formed a team to guide faith communities exploring creative uses of their campuses. We are encouraging innovations that serve the neighborhood while also providing revenue for our ministries.

Kevin S Brown

Bishop
Wilmington, DE
Episcopal Church in Delaware
Delaware



Before being called to priesthood, I studied for and received an MBA in 1996. I then worked in corporate finance at FedEx then help launch an money management firm. I served as Vice President of Operations (overseeing, among other things, investment compliance) for the firm as well as an investment manager.

Susan Brown Snook

Bishop
San Diego, CA
Bishop Diocesan
San Diego



I am the Bishop of the Diocese of San Diego, supporting our congregations for the changing future of the church. Our current generational and cultural shifts will require new efforts to ensure financial sustainability. I hope to support the church in this work by serving as a CPG Trustee. I hold an MBA and Master's in Accounting from Rice University, and had a 10-year career as a CPA before ordination. I served on TEC's Executive Council from 2012 to 2018 and chaired the Budget and Local Mission Committees, and now serve on the Joint Budget Committee. I also serve on CPG's Client Council, giving advice on CPG's products from a church perspective. I am the vice-chair of the Task Force on the Denominational Health Plan, which is researching ways to reduce health insurance costs. I am committed to helping all our congregations spend their resources wisely, supporting long-term financial security for employees while freeing up church assets for God's mission.

Members of the Court of Review

TERM OF OFFICE: 3 years*

NUMBER TO BE ELECTED: Three (3) bishops and one (1) alternate elected by the House of Bishops. Six (6) clergy with no fewer than two (2) priests and two (2) deacons and six (6) lay persons, and one (1) clergy alternate and one (1) lay alternate elected by the House of Deputies.

QUALITIES AND COMPETENCIES A NOMINEE SHOULD HAVE: Priests, Deacons and lay persons shall be or have been members of the Disciplinary Boards of their respective dioceses. Members of the Court of Review should be well-versed in the Canons; understand the goals and processes of Title IV; embrace a process that includes reconciliation as well as justice; and be able to articulate that goal in a way that does not deny or diminish the hurt of those who are feeling wronged. Compassion, dedication to finding solutions/resolutions that uphold the Canons in a manner that serves the overarching goal of reconciliation, and clarity about acceptable/unacceptable behavior are all essential qualities for Board members. Analytical thinking and the ability to balance the letter and spirit of the law are equally essential. It is vital that incumbents have computer literacy and Internet access. Candidates need the ability to keep information confidential and understand that it can be shared only within the guidelines of the Title IV process.

*When this slate was originally published it did not include staggered terms for bishops. Per the Canons, the Presiding Bishop will nominate bishops for 3 and 6 year terms. These nominations will be reflected in the elections on the Virtual Binder and in the Journal published after Convention.

Report to the 81st General Convention

Elect:	Lay 6+1 alternate	Clergy 7+1 alternate (including at least 2 priests and 2 deacons)	Bishop 3+1 alternate
Slate Needs at Minimum:	Lay 7	Clergy 8 (including at least 2 priests and 2 deacons)	Bishop 4

HoD elects lay and clergy; HoB elects bishops

Lay	Clergy (at least 2 priests, 2 deacons)	Bishops
Grecia Christian-Reynoso (IX Dominican Republic)	(D) Terry Howell (IV Atlanta)	Joseph Barker (VI Nebraska)
Delbert Glover (III Washington)	(D) Margaret Thor (VI Minnesota)	Elizabeth Gardner (VII Nevada)
Sharon Henes (I Connecticut)**	(P) Gregory Jacobs (IV North Carolina)	Betsey Monnot (VI Iowa)
Andrea Petrosch (VII W. Louisiana)	(P) Giovan King (VIII Hawaii)	E. Mark Stevenson (III Virginia)
Russell Randle (III Virginia)	(P) Tambria Lee (IV E. Carolina)	
Laura Russell (II Newark)	(P) Marisa Tabizon Thompson (VIII California)**	
D.C. “Woody” Bradford (VI Nebraska)	(P) Mariclaire Partee Carlsen (III Pennsylvania)	
** Nominee diocese changed		

Grecia Christian Reynoso

Lay

La Romana, República Dominicana

Iglesia Episcopal Todos Los Santos

Dominican Republic, IX

Attorney-Notary with interpersonal and teamwork skills, leadership and commitment, high sense of responsibility, ability to work in teams, promoting values and constant interest in acquiring new knowledge, both in my professional and religious life. Decision-making and planning skills, results-oriented, and willing to go above and beyond expectations to get the job done.



I am a Christian by birth, with a willingness to serve in my beloved Church. I am involved in the Ministry of the Sick as a Lay Minister and am currently in charge of bringing Communion to the handicapped in my Congregation. In addition, every Sunday I am in charge of imparting the Holy Eucharist, along with the Priest who serves at the Iglesia Episcopal Todos los Santos.

Delbert C. Glover

Lay

Washington, DC

National Cathedral

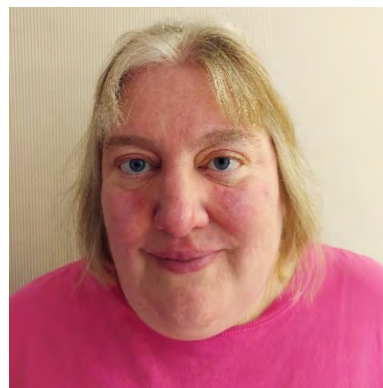
Washington

I am a candidate to serve as a Lay Member for the Court of Review. Although not an attorney, I have completed the Harvard Law School courses on Mediation and Negotiation. I have served as a Mediator for the Hampshire County Massachusetts Small Claim Court and on Grand Jury duty in Rhode Island, and as an Advisor in Title IV deliberations.



Sharon M Henes

Lay
Newington, CT
St. Dunstan's Episcopal Church
Connecticut, I



I bring the experience of serving on the Court of Review since its formation in 2019 and service on the Diocese of Milwaukee's Disciplinary Board for six years. I am well versed in both Title III and IV. At the 80th General Convention, I was a member of the Title IV Disciplinary Canons Committee. In addition, I bring the unique perspective of 15 years on a prosecution team for disciplinary cases involving licensed professionals including doctors, nurses, mental health counselors and pharmacists as well as 10 years of drafting unprofessional conduct laws. Underlying issues in these cases are similar to clergy issues. My viewpoint is discipline is not punishment; rather a balancing of rehabilitation/reconciliation, deterrence, and protection of the community. My gifts include analytical thinking, ability to see the big picture, strong advocacy, and compassion for all. My experience and gifts. I would be honored to continue utilizing my experiences and gifts on the Court of Review.

Andrea Rabalais Petrosch

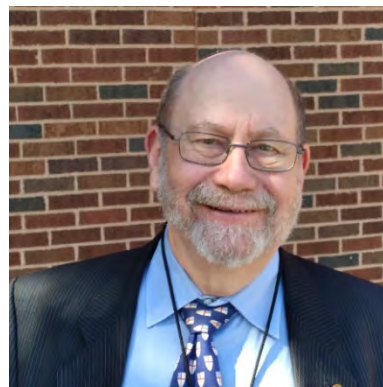
Lay
Bossier City, LA
Western Louisiana, VII



I currently serve as the President of Province VII. This is my most recent experience since I first became active in the church as a member of EYC and diocesan youth in the Diocese of Arkansas. As a military spouse with each new assignment I sought out opportunities to participate and serve the military and local communities and the Episcopal Church. Frequent moves, extensive Church work, and employment in finance and education taught me flexibility and teamwork. I have served on vestries and diocesan council, sung in choirs, and been a trustee for the University of the South. In every case, it was my responsibility to understand and follow guidelines, usually the Canons of the Episcopal Church or bylaws of the organization, and respond with dignity, grace, and courage to the task at hand. Time and talent are essential gifts for the health and life of our Church. Individual faith and communal worship hold us together in our work in the Church. I will share what I have wherever called.

Russell Randle

Lay
Arlington, VA
Saint Mary's, Arlington
Virginia, III



I have practiced law for over 40 years, often in complex litigation, and worked a year as a judicial law clerk at the federal district court and in some cases at the court of appeals, helping to draft opinions.

I currently serve on the SCSGCC, the body which helps General Convention update our canons, and previously served on Executive Council (2015-2022), where I helped write the Chief Legal Officer job description and update our conflict of interest and background check standards. I have studied canon law at VTS.

While on the Standing Committee in the 2000s, when the Standing Committee played a more active role in discipline, I helped resolve three serious clergy discipline matters. I have helped in the pro bono defense of criminal misconduct charges against a clergyman and in private practice helped resolve civil claims arising from criminal misconduct by a Scout leader.

I think my service would help both the Court and the TEC.

Laura Russell

Lay
Guttenberg, NJ
All Saints Episcopal Church, Hoboken, NJ
Newark, II



As attorney representing low-income survivors of domestic violence, I have spent my entire career working for justice. As a five-time deputy from the Diocese of Newark, I bring the policies from General Convention to the practice of Title IV. As the current President of the Court of Review, and the President of my Diocesan Disciplinary Board for over nine years, I feel I have the expertise needed for this position. I have been able to help shepherd multiple matters to conclusion. From this, I have come to understand the complexities of Title IV, along with the need to be compassionate, fair and recognize everyone's strengths and challenges. Conclusion does not equal winners or losers, only individuals in need of healing. I believe I have been able to help in that healing, for all parties. I have also chaired and served on various task forces, including task forces working on issues of sexism, sexual harassment and US and international policy. I would be honored to continue to serve.

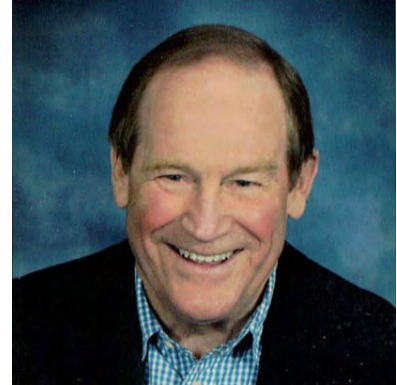
D.C. "Woody" Bradford

Lay

Omaha, NE

All Saints Episcopal Church

Nebraska, VI



I am a trial lawyer practicing civil and criminal law appearing on behalf of doctors, nurses, lawyers & accountants in preservation of their license.

I am the Chancellor of the Diocese of Nebraska and have had the opportunity to advise 4 Bishops regarding Title IV.

I have been a Deputy to the last 15 General Conventions and served on the Constitution & Canons Committee and the Standing Commission on Social Justice and Public Policy.

I am a founding member of The Tri-Faith Initiative in Omaha, Nebraska which has built a campus involving a Mosque, a Temple & a Christian Church. In that process I was a member of a 12 member Board, 4 Episcopalians, 4 Jews, & 4 Muslims, who came together to deal with substantive issues of reconciliation & had the opportunity to work with people of very different religions & ethnic backgrounds to structure a campus where all would be able to preserve, practice and worship the same God in their own distinctive way yet be bound together in peace & love.

Terry R Howell

Deacon

Tucker, GA

St Simon's, Conyers

Atlanta, IV



I have been an attorney for over 20 years, mostly doing litigation.

I listen very well. I consider myself to be unbiased, with a practiced sense of fairness honed over many years. I can glean nuances in standards and apply them to situations in a fair and compassionate manner. I believe that my skill set aligns very well with the tasks that I would need to address and consider in the

dual roles of Disciplinary Board for Bishops and The Court of Review.

Margaret Thor

Deacon

Arden Hills, MN

St John in the Wilderness

Minnesota, VI



I was ordained to the diaconate in June 2014. I retired in 2017 after 32 years in the Examination division of the Internal Revenue Service where I interpreted the tax law and applied it to the facts of a case. The majority of my career was spent as a manager and senior manager ensuring that those I led applied the law equitably. When meeting with taxpayers, I listened carefully to make certain that the taxpayers were heard and facts of the cases were fully developed. I then assured that the law was applied accurately to the facts. During the last GC, I served on the Rules of Order Committee. I am the chair of the diocese's COM, formerly a member of the ECMN council, and the former convener for the ECMN Commission of the Diaconate. I am an officer on the board of directors for a local area food shelf. I am also a member of the board for the Fund for the Diaconate. I am a deacon fulfilling my call to serve God in the world focusing on justice issues and to inspire others to do the same.

Gregory Jacobs

Priest

Durham, NC

St. Titus Episcopal Church, Durham

North Carolina, IV



I practiced law for 18 years specializing in labor and employment discrimination before entering the priesthood in 1995. I have served the Episcopal Church for more than 20 years in matters involving Title IV clergy misconduct. As a member of Constitution & Canons Committee (2000-2006), I helped refine and clarify canonical language adopted in the initial Title IV provisions, working closely with diocesan chancellors as well as members of the Committee. For 15 years, I served as the principal Title IV Intake Officer in both the Dioceses of Massachusetts and Newark. My responsibilities included initial intake, interview of all parties/witnesses, and investigation of more than a dozen Title IV allegations. My work culminated in reports to diocesan disciplinary review panels, summarizing the results of my investigations and recommending appropriate actions to be taken as well as participation in later stages of Title IV cases, including conciliation/resolution efforts and preparing cases.

Giovan King

Priest

Kailua, Hawaii

The Parish of St. Christoopher

Hawaii, VIII



At Stanford Law School, I published in the Law Review on the relationship between secular courts and ecclesiastical courts. As a priest, I was a judge and then justice of the Ecclesiastical Court in Los Angeles prior to becoming a priest in the Diocese of Hawaii in 2011. I was appointed President of the Disciplinary Board in the Hawaii Diocese shortly after my arrival in 2011. I believe we had three cases during that tenure. I later served another term on the Disciplinary Board. I have served on Reference, Conference and Hearing panels and have been an advisor several times for both complainants and respondents. I have attempted to make Canon IV as clear as possible to all involved in disciplinary matters. It does seem that we are at a pivotal time in clergy discipline, not simply with respect to bishops but with respect to all clergy.. I was asked in the fall by the Nominations Committee if I would agree to have my name submitted for the Court of Review and after much thought and prayer I agreed. I hope that if I am selected I may be of service in this critical aspect of our ministry. Mahalo.

Tambria Lee

Priest

Beaufort, NC

Saint Paul's Beaufort, NC

East Carolina, IV



I work at being a holy listener and make every effort to be responsive, rather than reactive in discernment. I love gleaning for fact & clarity in the midst of confusion, navigating the tension between competing truths, and working to find healing for all parties in the most improbable and tragic of circumstances. The court's call demands immediate response and I offer that with trust in the process , confidentiality, and prayer without ceasing. Serving as President of a Disciplinary Board for seven years has honed this wisdom while reminding me of the grace upon which we stand. There is a tension that often appears between the truth that Jesus says sets us free and the truth that Pilate questions. Whether it is the investigative work of Title III or the appellate work of Title IV it behooves us to embody the canons not as mere individuals with a cause or a side, but as people who long for what the Kingdom of God requires. "Love is the motive, but justice is the instrument."

Marisa Tabizon Thompson

Priest

San Carlos, CA

Episcopal Church of the Epiphany

California, VIII



As someone with a passion for justice for all people and an expectation that the leadership of this Church act in ways that do not harm the mission of the church or the individuals within and outside of the church, I feel called to the work of the Court of Review.

As part of my love of all things governance related, I have spent much of my time on the Standing Commission for Structure, Governance, Constitution, and Canons working on Title IV and dabbling in Title III, the two places from which the court gets its charge. As a priest, I have a vested interest in our disciplinary system. As a non-lawyer, I have worked to understand and translate the legal language and practices to make things clearer. I have a thorough understanding of the process and procedures and a keen eye for the places where justice and a pastoral hand could be more present. I am called to this work of aligning our policies and procedures with a church that preaches love, dignity, and grace.

Mariclaire Partee Carlsen

Priest

Acworth, GA

St. Catherine's

Pennsylvania, III



I have served as an Intake Officer for the Diocese of Pennsylvania since 2018, and find the work that I do to be very personally meaningful, even when challenging. I have found it to be a ministry of administration, accompaniment, and a very specialized sort of pastoral care to all participants in the process.

Before discerning my vocation to the priesthood, I was a judicial clerk and a labor and employment lawyer, which has helped ensure that my work in the disciplinary process is conducted efficiently and fairly. My perspective is that a functional, transparent process is faithful service to the Church and to all involved- complainants, respondents, all who give of their time to serve from Disciplinary Boards to Hearing Panels, as well as members of our congregations . Joining the Court of Review seems like a natural extension of the work that I have done to date in pursuing justice and reconciliation for all participants in the Title IV process.

Joseph Barker

Bishop
Omaha, NE
Nebraska, VI

I strive to be a good listener and a fair and impartial observer. I am organized, efficient, and I am not afraid to take work away from a meeting. I attended law school and worked in the legal field for three years prior to entering church ministry.



Elizabeth Gardner

Bishop
Las Vegas, NV
Nevada, VII

Elizabeth is the bishop of the Diocese of Nevada – a place that is both vast and small. Before becoming a bishop, Elizabeth was a rector, an interim, a diocesan staffer, an associate, and an assistant (does anyone really know the difference?). But before that, she worked in corporate, non-profit, and political worlds. Her varied and extensive background help her see how healing and wholeness are so needed in our Title IV process. In addition to accountability, Elizabeth wants due process undergirded with compassion and fairness. Elizabeth and her husband, Chris, live in Reno with their two dogs, their daughter's cat, and the many and varied dead animals the cat brings home.



Betsey Monnot

Bishop
Des Moines, IA
Iowa, VI



I see working within our disciplinary canons as similar to working within our liturgical rubrics in that we constantly need to maintain a dialogue between the details and the larger picture. In a disciplinary proceeding I see the larger picture as the mandate to do justice and love mercy, balanced with the details of the canonical procedures as laid out for us. I have worked with the disciplinary canons from several angles: as a member of the Ecclesiastical Court before the updated Title IV, as an Investigator, and now as a Bishop. I am able to keep track of canonical details and requirements and understand how they need to be followed in any living process. I am generally calm and clear-headed, and always seek to understand the positions of others, whether or not I agree with them. My goal is to work for agreement rather than a technical victory through a majority vote, even when the vote is what is required and recorded. I am capable of making hard decisions when necessary.

E. Mark Stevenson

Bishop
Richmond, VA
Virginia, III



Over the years of my ordained ministry, I have experienced a number of responsibilities that have allowed me to study deeply the polity and structure of The Episcopal Church. I served as canon to three bishops (including the Presiding Bishop), directed ministries on a regional and national scale, and now serve as Bishop Diocesan. I have a broad and thorough understanding of our canons, and have seen their application in a wide variety of settings and circumstances. It would be my hope to use the things I have learned in my study and work to aid the Court of Review in discussion and discernment as it addresses the proceedings, and sometimes unique challenges, brought before it.

Members of the Disciplinary Board for Bishops

TERM OF OFFICE: 6 years

NUMBER TO BE ELECTED: 5 bishops elected by the House of Bishops, 2 clergy (deacon or priest) and 2 lay persons elected by the House of Deputies

POSITION DESCRIPTION: The Disciplinary Board for Bishops is a court of the Church to have original jurisdiction over matters of discipline of Bishops, to hear Bishops' appeals from the imposition of restriction on ministry or placement on Administrative Leave and to determine venue issues as provided in Canon IV. 19.5. (This description is taken from Canon IV.17.3.)

QUALITIES AND COMPETENCIES A NOMINEE SHOULD HAVE: Members of the Disciplinary Board for Bishops should be well-versed in the Canons; understand the goals and processes of Title IV; embrace a process that includes reconciliation as well as justice; and be able to articulate that goal in a way that does not deny or diminish the hurt of those who are feeling wronged. Compassion, dedication to finding solutions/resolutions that uphold the Canons in a manner that serves the overarching goal of reconciliation, and clarity about acceptable/unacceptable behavior are all essential qualities for Board members. Analytical thinking and the ability to balance the letter and spirit of the law are equally essential. It is vital that incumbents have computer literacy and Internet access. Candidates need the ability to keep information confidential and understand that it can be shared only within the guidelines of the Title IV process

Elect: Lay 2 Clergy 2 Bishop 5
 Slate Needs Minimum of: Lay 3 Clergy 3 Bishop 8

HoD elects lay and clergy; HoB elects bishops

Lay	Clergy	Bishops	
Joan Case (II Convocation of Episcopal Churches in Europe)	Channing Smith (VIII, Los Angeles)	Thomas Brown (I Maine)	Gregory Rickel (IV SE. Florida)
Joe Thompson (VIII California)	Christy Stang (VI Minnesota)	Brian Cole (IV E. Tennessee)	Martha Stebbins (VI Montana)
Alan Murray (VIII Oregon)	Molly Weiss (VI Minnesota)	Mark Cowell (VII W. Kansas)	Megan Traquair (VIII N. California)
Michael Truncale (VII Texas)	Fatima Yakubu-Madus (V Indianapolis)	Wendell Gibbs (V Michigan)	Ruth Woodliff-Stanley (IV S. Carolina)

Thomas Brown

Bishop
Portland, ME
Maine, I



In the past 25 years I have served on several general church commissions, committees, agencies, and boards. As a longtime deputy to General Convention, and now as a bishop, I have experience working alongside others to strengthen the Episcopal Church's response to the Great Commission. Yet to do the work of growing Christians we need policies and structures that will ensure transparency, health in all its forms, and accountability of the church's leaders.

My interest in serving on the Disciplinary Board of Bishops reflects an interest in making sure the disciplinary process for bishops is followed consistently and correctly. Furthermore, I am a relatively inexperienced bishop, and I hope that my new perspective will be put to use in building a disciplinary board who are fair, honest, and willing to make difficult decisions.

Brian Cole

Bishop
Knoxville, TN
East Tennessee, IV



I have a deep interest in supporting the health and wholeness of the House of Bishops and our shared ministry.

Mark Cowell

Bishop
Larned, Kansas
Western Kansas, VII



I am, in my secular life, currently a county attorney and a city prosecutor. I have 29 years experience practicing law. My training is in the evaluation, preparation and prosecution of offenses. I am able to read and interpret statutes, ordinances and canons, and I understand the procedures required. If elected, I would bring my professional training and skills to this board. Thank you for the opportunity to serve.

Wendell Gibbs

Bishop
Lewis Center, OH
Michigan, V

I have served on numerous bodies in the Church, most recently as Chair of the Committee on Dispatch for the House of Bishops and as a member of the Disciplinary Board for Bishops. My tenure as a bishop diocesan afforded me hands-on experience with Title IV and that experience has been useful in my first term on the DBB. I believe that experience is important when seeking to hold people accountable for their actions while also seeking reconciliation and healing for all parties involved.



Gregory Rickel

Bishop
Ft. Lauderdale, FL
Southeast Florida, IV

I have been a bishop for 15 plus years and in that time have learned the Title IV system, watched it change, etc. Along with my MDiv and D.Min I hold a Masters in Interpersonal and Organizational Communication and a Master's in Health Service Administration.



Martha Stebbins

Bishop
Helena, MT
Montana, VI

I am a diocesan bishop in my 4th year. Prior to my election, I was on a variety of diocesan bodies for which I had to become familiar with the Episcopal Church canons. My prior background as a veterinarian and epidemiologist. It is from that profession where I was trained in critical thinking and problem solving. I believe these gifts and my experience now as a bishop would be an asset to the Disciplinary Board for Bishops.



Megan Traquair

Bishop
Fair Oaks, CA
Northern California, VIII



Our disciplinary Canons aim for healing and redemption in painful circumstances. I believe I have the knowledge and experiences to contribute to this process for Bishops. I have worked through complex disciplinary matters, first as Canon to the Ordinary and Intake Officer (2013-2019) and now as Bishop Diocesan (2019 - present). I am familiar with the range of emotional responses which can arise in the persons involved. Equally valuable has been the the careful work with the multiple parties involved in any larger altercation, which includes the parish or diocese itself. All participants need a path to healing in Christ. Beyond addressing the issue at hand, is the importance of laying the groundwork for redemption and restoration of communal life, though not in the same setting anymore. I believe my skills, experiences, and pastoral awareness would be valuable for serving on the Bishop's Disciplinary Board.

Ruth Woodliff-Stanley

Bishop
Charleston, SC
South Carolina, IV



My calling has included work to transform conflict and bridge across lines of difference in the church over the past three decades. This work has led me to hone skills of considering situations from multiple vantage points, listening with much care in the belief that the truth comes into sharpest relief when a multitude of voices are clearly heard and fully respected. I have been responsible for disciplinary processes in different parts of the Body of Christ. These processes have required spiritual grounding and a capacity for thorough work held in a theology of redemption and hope. I have a strong commitment to justice accompanied by a respect for the power dynamics with which we must wrestle always as we do the holy work of seeking the truth of any situation. I believe our commitment as bishops to hold one another accountable is holy and life giving. I believe what is good for the body is good for the individual, and what is good for the individual is good for the body.

Channing Smith

Priest

Montecito, CA

All Saints by the Sea

Los Angeles, VIII



All ministry is pastoral. In my 30+ years of ordained ministry, I have both learned this and lived into this value. In addition, I believe deeply in the healing and transformational presence of God in our lives and in the life of the church. Through pastoral care and accountability, I have seen the Spirit change and heal painful experiences in church communities. During my ministry, I have chaired three different school boards and believe deeply in the importance of governance, roles and responsibilities. Having been trained in inquiry-driven leadership, I bring a curiosity and an interest to know and learn more about a situation while including everyone within the group to share their perspective. I have had diocesan experience serving on the standing committees of two different dioceses as well as chairing a diocesan stewardship committee for 5 years. It is personally important for me to continue to expand the reach of the Episcopal church and encourage the practice of racial healing and increased diversity. My previous parish was active in this work being one of the first congregations in the Episcopal Diocese of Texas to participate in Project Curate. As of January of this year, I began serving as rector of All Saints by the Sea in Montecito, CA.

Christy Stang

Priest

Chanhassen, MN

St. Stephen's Episcopal Church, Edina, MN

Minnesota, VI



Although new to ministry, I am passionate about ensuring that clergy are supported, both in preventative care and responsive support in cases of misconduct and complaints, especially bishops. I have observed the positive and negative repercussions of behavior in the episcopate, and if elected to the Disciplinary Board for Bishops, I would bring my work ethic, deep faith in Jesus, and a holistic approach to the individual along with an awareness of the Canons. I hold myself accountable to being open-minded and compassionate, responding to information with an eye for detail as well as for the bigger picture. As someone elected as an alternate deputy for the Minnesota delegation to General Convention in 2024, I understand that the structure and decisiveness of the Canons provide both a necessary and pastoral framework for church life. I hope to have many years of ministry ahead of me, and I am invested in the health and well-being of everyone in the church.

Molly Weiss

Priest

Oakdale, MN

Christ Episcopal Church, Woodbury

Minnesota, VI



Across my 23 year career in corporate and non-profit Human Resources, my primary role was to ensure the following of policies and law – both corporate as well as State and Federal. I am a trained investigator and have conducted innumerable and a wide variety of investigations. At the end of these investigations, my role was to help leaders make tough decisions about how to handle the process with care, especially showing respect and honoring the dignity of all involved. In my formation for priesthood, I took classes on the Canons and have, as applicable, applied this knowledge in my work as the Chair of the Personnel Committee for the Episcopal Church in Minnesota.

Fatima Yakubu-Madus

Deacon

Indianapolis, IN

Christ Church Cathedral

Indianapolis, V



1. Networking in the church and Community
2. Discernment
3. Advocacy and Outreach
4. Mission work in Africa

The experiences listed above give me a broader view of the church and the world at large. I served two terms on Commission on Ministry, this allowed me the opportunity to walk with aspirants in discerning their call. In addition, I was on the search committee for my current Bishop. I am currently on the board for the Funds for the Diaconate. I have been ordained since 2010 and serving my second parish.

I worked in a fortune 10 Pharmaceutical company multiple roles as a research scientist, manager of a laboratory, and operation consultant.

I have continued to be a missionary for Community Engagement and served as a deacon at Christ Church Cathedral.

Founded a non profit organization in 2008 that has given me the opportunity to collaborate with different Dioceses in the Anglican Communion.

Joan Case

Lay

Holzkirchen, Bavaria

Church of the Ascension, Munich, Germany

Convocation of Episcopal Churches in Europe, II



I am a lay person who is engaged in various ministries and am active in the local community in particular as a trained hospice volunteer.

Interacting effectively with a wide range of people has been an important part of my life as a church leader, as a volunteer working in a crisis management team and in my professional life. I have acute

listening skills, being trusted to operate closely in confidence with vulnerable people who are in sensitive situations. I have been invited to act as a confidante and counsellor and have experience in conflict resolution. I am able to analyse and process complex information.

I am not a legal specialist but do have sound common sense. I am conscious of the goals and processes of Title IV, recognize the importance of prayerful consideration of information and am cognizant of the need for justice and reconciliation for all persons impacted by Title IV-related events. I believe that my competences and skills would be helpful on the Disciplinary Board.

Joseph Thompson

Lay

Omaha, NE

Epiphany, San Carlos CA

California, VIII



I am a clergy spouse, the proud holder of a M.Div. degree from Yale, and an attorney licensed to practice law in Oregon, Nebraska, and North Carolina. I have served as a Deputy District Attorney, General Counsel for a state agency, and as an Administrative Law Judge, presiding over cases where the stakes

ranged from loss of a license to involuntary medication of the ill. My experience as a lay leader, with courtroom procedure, and decision-making in contested cases makes me well qualified to serve on the Disciplinary Board for Bishops.

If elected, I will serve faithfully in accordance with our Baptismal Covenant: striving for justice, striving for peace, and with respect for the dignity of every human being. I will do everything in my power to ensure diligent pursuit of accountability and reconciliation, a level playing field, fair and impartial treatment for all parties, and a caring heart for all those injured, intentionally or accidentally, by the church.

Alan Murray

Lay

Milwaukie, OR

All Saints Episcopal Church, Portland, OR
Oregon, VIII



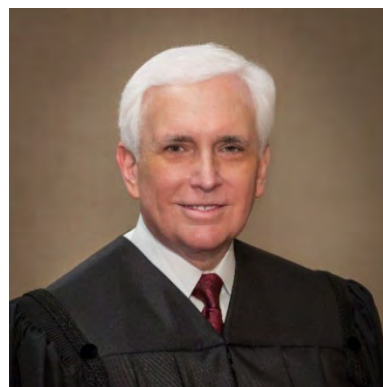
My professional background as a Marriage and Family Therapist and a Clinical Practice Specialist has helped me to understand how systems work and impact each other. I earned my counseling graduate degree in a Mennonite seminary which specializes in peace making, conflict resolution and mediation. I have over twenty years of clinical experience in many clinical and corporate settings which requires analytic and systemic thinking along with the art of bringing healing and wholeness. My involvement in the General Convention, interim bodies and legislative committees have equipped me with a good knowledge of the canons and especially Title IV. I value transparency, accountability, deep listening and collaboration. I have companioned clergy who had undergone disciplinary process and understands both the letter and the spirit of the law, holding the tension of both justice and reconciliation as a goal. As a queer person of color, I hope to bring a diverse perspective to the Disciplinary Board.

Michael Truncala

Lay

Beaumont, TX

St. Mark's Episcopal Beaumont, Texas
Texas, VII



Prior to becoming a federal judge, I was a trial lawyer, mediator, and arbitrator. In this capacity, I learned the importance of understanding that there are two sides to every story. Through the adversarial process, the truth emerges. Also, I learned that corrective measures (e.g. verdicts, settlements) need to be tailored to create the appropriate outcome based upon the facts and the law. The skills that I learned as a lawyer, mediator, and arbitrator are the skills that I rely upon as a judge. As a judge, I apply the rule of law to the facts of each case. I let the law and the facts guide me. I suspect that the same skills would be useful in analyzing matters that come before the Board of Discipline. Finally, I have learned that regardless of the merits of claims or defenses, all participants in the process should be treated with dignity and respect.

Executive Council

TERM OF OFFICE: 6 years

NUMBER TO BE ELECTED: 6 lay persons, 2 presbyters or deacons, 2 bishops

POSITION DESCRIPTION: The Executive Council is the Board of Directors of the Domestic and Foreign Missionary Society (DFMS) (Title I, Canon 3 (Article II, Constitution of DFMS)). In addition, Members carry out the program and policies adopted by the General Convention and have charge of the coordination, development, and implementation of the ministry and mission of the Church. The Executive Council is required to manage the budget of the Church, to submit to General Convention a budget for the next triennium, and to make annual reports to the Church of receipts and disbursements and a statement of all trust funds and properties. (Title I, Canon 4). The Council does its work within four standing committees: Finance, Governance and Operations, Mission Beyond the Episcopal Church, and Mission Within the Episcopal Church. Standing Committees and Task Forces of the Council may meet either by teleconference or in person for two or three days excluding additional travel time in the interim between Council's regular meetings (see Canon I.4. Appointments may be made to some Interim Bodies as liaisons). Members are expected to attend all meetings, unless otherwise excused, and to come to all meetings prepared for the work ahead including reading all reports and other materials sent to members in advance of meetings.

QUALITIES & COMPETENCIES AND NOMINEE SHOULD HAVE: All nominees must have a commitment to this ministry and the time to participate fully. Council members need a deep commitment to God's mission in the Church and world, strong faith, openness to new ideas, flexibility, the ability to communicate in small and large groups, the capacity to engage with staff members from the Episcopal Church Center, and a broad perspective of the Church on a local and global scale. Nominees should have a broad, compassionate understanding of the needs of The Episcopal Church, and a strong commitment to the Church's mission and ministry. We seek and strive for diverse voices and skills appropriate to our mission. Specific skills and gifts are desired in the areas of: 1) evangelism, racial reconciliation or stewardship of creation; 2) understanding of the workings of the Anglican Communion and The Episcopal Church; 3) finances and budget management; 4) organizational development; 5) the fiscal and fiduciary duties of corporate directors; 6) proven advocacy skills; and 7) good communication abilities, as well as abilities in the planning, implementation and completion of assignments.

Report to the 81st General Convention

Elect: Lay 6 Clergy 2 Bishop 2
 Slate Needs Minimum of: Lay 12 Clergy 4 Bishop 4

HoD elects clergy and lay; HoB elects bishops

Lay		Clergy	Bishops
Wendy Blackman (II New Jersey)	Heidi Kim (VI Minnesota)	Randy Callender (III Maryland)	Diane Jardine Bruce (VIII Los Angeles)
Wendy Cañas (II New York)	Laura Russell (II Newark)	Karen Coleman (I Massachusetts)	Jonathan Folts (VI South Dakota)
Grecia Christian Reynoso (IX Dominican Republic)	Katie Sherrod (VII Texas)	Kimberly Jackson (IV Atlanta)	Susan Haynes (III S. Virginia)
Victor Feliberty-Ruberté (II)	Jill Showers Chow (IV Alabama)	Lester Mackenzie (VIII Los Angeles)	Bonnie Perry (V Michigan)
GJ Gordy (VIII Navajoland)	Linda Aristondo (II, New York)	Eric Metoyer (VIII California)	
Warren Hawk (VI S. Dakota)		Rhonda Rogers (VII Texas)	

Wendy Blackman

Lay
Hackensack, New Jersey
St. Mark's Episcopal
New Jersey, II



I was baptized and confirmed in the Anglican Church in Barbados, lived in the United Kingdom during my teenage and young adult life, attended church while there. Have been in the USA for almost fifty years and have been involved in the Episcopal Church for over forty years.

I served in multiple capacities, at the local level, Youth Group leader, acolytes, Lecture, Usher, Vestry, LEM, Alter Guild, currently Senior Warden.

Diocesan Level, Diocesan Council, Standing Committee, Board of Mission, Commission on Black Ministry, Anti Racism Commission, Acolyte Festival Co-Ordinator, Chair of the Van Duzer Scholarship Committee, Search Committee for Current Bishop Elect Sally French .

Member of (UBE) Union of Black Episcopalians for many years, Current President Earl B. Scott Chapter Diocese of NJ '

Retired Neurosurgical Critical Nurse. I have worked with people from all walks of life. I love people, in retirement I continue to engage with people am not afraid to voice my opinion.

Wendy Cañas

Lay
Bronx, NY
St. Ann's Episcopal Church
New York, II



"Love in Action"

In 2008, I became a member of the Episcopal Church because I saw my Church serving all community members with love in action. The love in action I experienced the year at St. Ann's made me understand that serving my neighbor is the ultimate love that all Christians must share in their daily ministry. My work at the parish level and various diocesan committees prepares me to be an excellent executive council member. In my Church, I held a vestry member position and warden. At this moment, I am the Church's treasure. In the Diocese of New York, my first leadership experience was in the council. As a council member (2010), I served on the social concern and budget committees.

My first experience with General Convention was in 2015 as an Alternate. In 2015, I was amazed by all the work that happened among the "Deputies of Color" to ensure that all church members feel loved and respected in the Church. My hope is my leadership experience as a member.

Grecia Christian Reynso

Lay

La Romana, República Dominicana

Iglesia Episcopal Todos Los Santos

Dominican Republic, IX



I have been an Episcopalian since birth, and I am a LAWYER - NOTARY with a DOCTORATE degree. I have served on diocesan and local committees, including the following:

Chancellor of the Diocese, Chair of the Committee on Constitution and Canons, member of the Women’s Fellowship,

Daughter of the King, Evangelism, and Fellowship, and I was a member of the Disciplinary Board, as well as a member of the Task Force Committee on Cuba, the standing committee of World Mission, and currently a member of the Court of Review of the Episcopal Church.

For me it has been a great experience to work, serve, worship and glorify with love, humility and simplicity of heart, putting my knowledge, gifts and talent at the service of my Episcopal church. I give all this for the blessings I always receive from our Lord Jesus Christ.

Victor Feliberty-Ruberte

Lay

Ponce, PR

San Lucas Evangelista

Puerto Rico, II



Episcopal Lay Educator

Professional Experience: Full Professor at the Inter-American University of PR, teaching courses in history, cultural studies, and qualitative research methodologies. I have also served as dean of administration & finance (2002 to 2018) and now as academic dean (since February 2020).

Education: B.S. in Industrial Engineering from the University of PR; M.Div. with a focused area in Historical Theology from Columbia Theological Seminary in Decatur, Georgia; and Ph.D. in History with a subspecialty in History of the Americas from the IAUPR Metropolitan Campus. In addition, I have completed professional certifications in Strategic Planning, Lean Enterprise, Leadership, Project Management, Mediation and Conflict Management, and Coaching, among others.

It will be an honor to serve in Church governance, bringing my talents, perspectives, and experiences to affirm the Anglican tradition and its commitment to racial, environmental, gender, and economic justice.

Gerlene Gordy

Lay

Farmington, NM

St. Marks Church

Navajoland Area Mission, VIII

I am a lifelong Episcopalian, having grown up in St. Mark's Church in Coal Mine, New Mexico. At the beginning of my service to the church, it was primarily to represent my small church in our annual convocation.

My life in the church began with leading Sunday School, Senior Warden, Area Mission Council, Vacation Bible School, Commission on Ministry, Youth Coordinator, General Convention Deputy, and now Communications for the Area Mission. I have also served as vice chair of a legislative committee to the General Convention. I am now an Evangelism Grant's Committee member and sit on the board for Episcopal Communicators. I have also participated in many events and conferences with the Native American/Indigenous Ministries of the Episcopal Church.

Through my background as a layperson in the Episcopal Church with deep cultural indigenous roots and my work in Communications and outreach, I feel that I have the skill set to be useful and can offer a unique voice to the Executive Council.



Warren Hawk

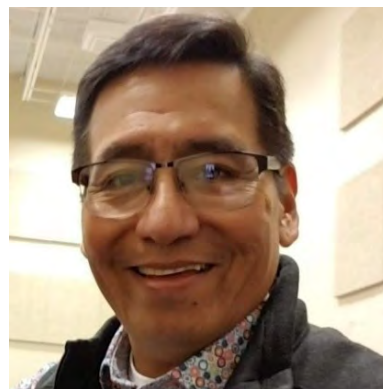
Lay

Wakpala, South Dakota

St. Elizabeth's Mission Church, Standing Rock Mission

South Dakota, VI

At-Large Tribal Council, Standing Rock Sioux Tribe. Constitutional oaths: Exercise powers through appropriate motion, resolution or ordinance, subject to any limitation of the Constitution or applicable statues of the United States. Negotiate with Tribal, Federal, State, Local and International governments and advise and consult with representatives of said governmental agencies on all activities which may affect the Tribe. Advise the Secretary of the Interior on all appropriation estimates or Federal projects for the benefit of the Tribe. Promote and protect the health, education and general welfare of the members of the Tribe. Manage, protect and preserve the property of the Tribe and the wildlife and natural resources of the Tribe. Administer any funds within the control of the Tribe. All other Legislative and Governmental duties outlined in the Standing Rock Sioux Tribal Constitution and Ordinances. Serve as Chair of the Judicial Committee - Budgetary and Law legislative body.



Heidi Kim

Lay

Minneapolis, MN

St. John the Evangelist, St. Paul, MN

Minnesota, VI



I have been engaged in the ministry of racial healing and justice-making for over 40 years, in the church and in secular society. I served as the Staff Officer for Racial Reconciliation on the Presiding Bishop's staff for 5 years and have been the convener of a Commission for Racial Healing and Justice in ECMN. I have engaged in research and private consulting around conflict transformation and organization development in faith communities and am a Qualified Administrator of the Intercultural Development Inventory. I also have a background in secondary and higher education and the nonprofit sector. I have deep experience in organizational culture/change initiatives, including challenging issues in human resources management. I am a Korean American immigrant currently residing in Province VI. I would feel humbled and privileged to serve the church as a member of the Executive Council.

Laura Russell

Lay

Guttenberg, NJ

All Saints Episcopal Parish, Hoboken, New Jersey

Newark, II



My calling is church governance. I am blessed to be able to use this passion in roles at all levels of our Church. My skills in church polity, governance and advocacy are what I can bring to Executive Council. I served as Chair of the Social Justice and International Policy Legislative Committee. I am a five-time Deputy, and chaired several interim bodies, recently Chairing the Committee to Oversee our Anti-Harassment Policies. I am the President of the Court of Review. As a board member of non-profits, I drafted bylaws and procedures. As a practicing attorney representing low-income survivors of domestic violence, I have spent my career working for justice, and bring my desire for justice to every committee I am on. Working for a not-for-profit, I learned budget management and strategic planning. Throughout my career and within the Church, I have sought to mentor young adults and raise up all voices in the Church by creating safe space and working to ensure equity in processes.

Katie Sherrod

Lay

Fort Worth, TX

St. Luke's in the Meadow, Fort Worth

Texas, VII



Polity matters. A powerful force for good is generated when laity, deacons, priests, and bishops work together, all respecting the dignity of every order of ministry. It matters especially in times of stress. If pulled out of balance, great harm can result.

I know how to speak up, taught by lived experience in the Diocese of Fort Worth, reporting on 2 Lambeth Conferences, taking part in 12 General Conventions, and previous service on the Executive Council 2009-15.

In a post pandemic world, amidst grief of more than one million deaths, we can minister to physical, emotional, and spiritual exhaustion with the life-giving, energy-generating news of a loving God.

We must be a safe place for the historically marginalized, invisible, and ignored, especially the targets of powerful interest groups. We must not only speak up for them, we must stand with them when they speak up.

All this, because when we mark someone in baptism as Christ's own forever, it is with a cross, not an asterisk.

Jill Showers Chow

Lay

Mobile, AL

Christ Church Cathedral

Alabama, IV



I am a lifelong Episcopalian. Over the years, I've had many experiences with church groups and programs. In particular, my work with Baptized for Life Initiative has provided me with the opportunity to not only share my spirituality with other but to look within myself and how God calls me to be a disciple. An experience that I look back to has been through the continued partnership with the Mobile MOB Pacers; we began a ministry series to promote health and wellness through physical exercise and healthy eating habits. Through evening walks and monthly dinners, we were able to not only teach people about keeping their bodies healthy and active but also to engage their minds and spirits with thoughtful conversations during our ministries. The Baptized for Life Initiative also allowed me to participate in the Prayers in the Park Project. We reached out to the unhoused, our neighbors, and those who are alone. In our time together we shared meals, Eucharist, and conversation.

Linda Aristondo

Lay

New York, NY

St Mary's Episcopal Church (Harlem) New York City

New York, II

I am a Latina lay member of the Church at this time, a third-year seminarian, and on the ordination track in the Diocese of New York. Among my competencies is devotion to justice and reconciliation exemplified by my current role as an attorney in the field of restorative justice. I function as legal counsel with a commitment to the highest standard of justice while seeking opportunities for the individual charged to be offered the most supportive systems available as they journey to return to the best version of themselves. I also acknowledge the pain of aggrieved individuals who also deserve to be lovingly heard and seen while justice is made available to both parties. I place my competencies and skills at the door of the Church, at large. It would be an honor and privilege to serve in this capacity.



Randy Callender

Priest

Odenton, MD

St. Philip's, Annapolis

Maryland, III

As a committed member of the Episcopal Church, I strongly believe in the mission and values of our faith. I have been actively involved in the church community for many years, serving in various leadership roles and participating in numerous ecumenical and outreach ministries. As such, I believe that I possess the competencies and skills that are essential to serving on Executive Council. One of my greatest strengths is my ability to communicate effectively. Whether it is through public speaking or written communication, I am able to convey complex ideas and information in a clear and concise manner. I believe that this skill would be particularly valuable in my role on the Executive Council, as I would be able to effectively communicate the needs and concerns of our church community to other members of the council. Many would describe me as a person who is hospitable, warm, and a church nerd who truly loves his Savior and is committed to serving Jesus Christ.



Karen Coleman

Priest

Ashland, MA

Boston University / Trinity Episcopal Boston

Massachusetts, I



As a follower of Jesus and deeply committed to God's mission in the Church and the world, I am an effective leader on The Executive Council. I have served both as an alternate and clerical deputy. At the last GC, I served on Legislative Committee 03 - Title IV. I have worked in various small and large parishes to look at diverse perspectives in the more remarkable church and the local community. From grassroots to investment portfolios, my experience covers a variety of relationships along racial, socio-economic, gender, and abilities to ensure that all have a place of welcome at the table. I am deeply committed to how we care for our planet and to assist in the stewardship of the resources placed into our care. My current position as University Chaplain for Episcopal Ministry allows me to work with the future leaders of our church, both lay and ordained. I am excited to see people of all ages become engaged and involved in the church.

Kimberly Jackson

Priest

Stone Mountain, GA

Episcopal Church of the Common Ground

Atlanta, IV



I've served in a myriad of ministry settings that vary in size, context, and demographical make-up. From campus ministry on an HBCU campus, to leading a very small parish, to serving as an associate rector in one of TEC's largest parishes, and now as a priest who works with people experiencing homelessness, these experiences will help me approach the issues brought to Executive Council with an open and broad perspective. I understand the difference in impact that our decisions can have on people in different contexts.

I also serve as a state senator in Georgia. This service has honed my skills in conflict transformation, problem-solving, and budgeting. As a senator, I work well with people who hold different ideological stances, and representing over 200,000 constituents has taught me the importance of thinking carefully about how policies impact everyone. Whether in the senate, the parish, or community, I am a person who brings compassion, wisdom, and integrity to my work.

Lester Mackenzie

Priest

Newport Beach, CA

St. Mary's Episcopal Church Laguna Beach CA

Los Angeles, VIII



With 15+ years in ministry, I'm passionate about serving the Church and fostering unity within our diverse community, with Jesus as our centre. My experience demonstrates commitment by having served as C1 Clergy Deputy for the Diocese of Los Angeles in three General Conventions of the Episcopal Church.

With deep understanding of the Anglican Communion and The Episcopal Church, I bring financial management experience and effective communication skills. I serve on Standing Committee, Diocesan Council, served on Corporation of the Diocese of Los Angeles, and as Chaplain to the House of Deputies in three General Conventions.

If elected to Executive Council, I'll diligently fulfill fiduciary duties with loyalty and care. As a cross-cultural leader, I'll promote representation and inclusivity. My familiarity with technology and computer literacy enables effective use of tools like Zoom & Microsoft Teams. I'm eager to utilize my diverse skillset to support the Church's mission.

Eric Metoyer

Priest

San Francisco, CA

St Cyprian's, San Francisco

California, VIII



Our New Episcopal Communities are deepening the faith for many in new ways. I am called to support these communities at all levels of the Church. I've served on DioCal's Diocesan Staff in San Francisco for many years, focussed on multi cultural communities and congregational life. I also served as rector of a small parish in the midst of the pandemic, innovative worship and technological adaptation working to build a stronger, faith based community. I've served as former chair of the Afro Anglican Commission, three time Deputy to General Convention, and board member of an Episcopal School. In the wider church I've served on interim bodies focussed on church planting and congregational renewal since 2015, bringing the experience of DioCal to the wider church and the learning of the Church to DioCal. This experience and involvement in new ministries for a changing church is my call to serving on the Executive Council of The Episcopal Church. Thanks be to God, Amen!

Rhonda Rogers

Priest

Humble, TX

St. Francis of Assisi, Prairie View

Texas, VII



I am a life-long Episcopalian and currently at St. Francis of Assisi in Prairie View, TX. I would use my skills and experience to aid the Executive Council to discern the needs of the body, how to meet them, and serve everyone with dignity and respect.

I served on several bodies in the Episcopal Church at the diocesan level. I was a lay representative on the Diocese of Rochester Standing Committee under two bishops, clergy representative on the Diocese of Texas Executive Board and currently on the Seminary of the Southwest Board of Trustees.

During 38 years at Mobil Chemical Company and ExxonMobil Chemical Company, I developed and managed metrics, strategic goals, regional and global budgets, implemented corporate and division initiatives, and coached personnel development.

I have three adult children and two grandchildren. My hobbies are reading, golf, gardening, travel, music, and theatre.

I would be honored to serve on Executive Council.

Diane Jardine Bruce

Bishop

Irvine, CA

Los Angeles, VIII



My almost 12 years as Bishop Suffragan in the Diocese of Los Angeles entailed extensive work in New Community/Multicultural Ministry and Stewardship. I know the blessings and opportunities in this work for our Church. In addition, my prior work as a banker for 17 years provided me with extensive knowledge of finance, both in investments and in the preparation of complex budgets.

Currently serving as Bishop Provisional of the Diocese of West Missouri has introduced me to a part of TEC with different opportunities for evangelism and growth. Being involved in the life of rural congregations particularly opened my eyes to their unique challenges.

I am finishing 12 years as a trustee of the Church Pension Fund, which provides me with extensive knowledge of this important work for our church.

I hope to bring my varied experiences both secular and ecclesiastical, together with my collaborative and transparent leadership style, to benefit the church by serving on Executive Council.

Jonathan Folts

Bishop
Pierre, SD
South Dakota, VI



As bishop of South Dakota, with the largest Native American population of our Church, there are several areas between what is being looked for in an Executive Council member and the subjects we engage. In SD, where prejudice is high and media coverage is low, racial relationships are key in bringing the Church and our communities together. We consider care of creation to be vital, and our Diocesan Leadership Initiative project in 2022 involved planting prairie grass gardens and teaching about their benefits. Due to our minimum budget, we are creative about our spending. Additionally, in developing partnerships and raising awareness, we strive to be good advocates and communicators. At heart, our focus in 2023 is to be people who love to tell the story and God's role in our story. I have good project management skills, much to the disdain of my favorite procrastinators, and believe (with kudos to the A-Team) that there is nothing so good as to see a part of God's plan come together!

Susan Haynes

Bishop
Williamsburg, VA
Southern Virginia, III



My most important competency is the ability to form connections and build bridges between people in two different camps. By focusing on what we believe and celebrate in common, I am able to build relationships through service and conversation. I also have an enormous capacity to attend to details and to keep projects moving forward so that we don't get bogged down.

Bonnie Perry

Bishop

Detroit, MI

Michigan, V

As the Episcopal Church grapples with post-pandemic challenges, we must align our governance structures and resources with a plan for institutional transformation. My experience as a bishop and parish priest has taught me how to achieve the incremental, measurable changes we will need to realize that plan. I know how to move groups along, celebrating successes and learning from setbacks, without losing sight of the call to participate effectively and faithfully in God's mission. My steadfastness, my belief in Christ's unshakeable love, and my sense of humor enable me to weather the challenges of leading change with joy and wonder.

In a class I taught at Bexley Seabury Seminary, I asked students to envision a world in which mission is central to everything the church undertakes. As we enter this time of leadership transition, I believe that the Episcopal Church must envision that world, and I'd be honored to help lead the effort as a member of Executive Council.



Members of the General Board of Examining Chaplains

The House of Bishops elects all members, and the House of Deputies votes to affirm the election.

TERM OF OFFICE: 6 years

NUMBER TO BE ELECTED: 3 lay persons; 3 faculty members of theological seminaries or other educational institutions; 3 presbyters with pastoral cures or in specialized ministries; 2 bishops. (HOB elects; HOD confirms elections)

POSITION DESCRIPTION: GBEC board members write the annual General Ordination Examination (GOE) administered to candidates for eventual ordination as priests. The examination includes tests for proficiency in Holy Scriptures, the history of the Christian church, Christian theology, Christian ethics and moral theology, Christian worship, and the practice of ministry. Writing the GOE includes both composing questions and the associated rubrics for answering those questions; these rubrics are provided to guide candidates as they answer the questions. Board members also evaluate the candidates' answers in the weeks following the administration of the exam. At its meetings, the board, made up of 22 members total, evaluates and plans for the succeeding year's work and oversees the work of the board's paid executive director and testing and professional consultants.

QUALITIES AND COMPETENCIES A NOMINEE SHOULD HAVE: Nominees should have an interest in theological education and some expertise in one of the six canonical areas. Previous experience on a diocesan Commission on Ministry or as a diocesan examining chaplain is helpful. Competency in testing methods and procedures is useful. Board members should be able to work comfortably in teams and task groups. GBEC assignments demand ability to concentrate intently on tasks at hand. It is vital that applicants have computer literacy, Internet access, and the ability to work online with others.

Report to the 81st General Convention

Elect: Lay 3 Clergy 3 Seminary Faculty 3 Bishop 2
 Slate Needs Minimum of: Lay 5 Clergy 5 Seminary Faculty 5 Bishop 3
 Presbyters with pastoral care or specialized ministry

HoB elects all; HoD affirms elections

Lay	Clergy (Priest in active ministry)	Seminary Faculty (Clergy or Lay)	Bishops
Cynthia Hill (VII Texas)	Andrew Armond (VII Texas)	Scott Bader-Saye (VII Texas)	Cathleen Bascom (VII Kansas)
David Miron (III Central PA)	Giovan King (VIII Hawaii)	Kirsten Guidero (V N. Indiana)	Nicholas Knisely (I Rhode Island)
Janeal White (VII Texas)	Mark Kowalewski (II Long Island)	David Jackson (VIII Hawaii)	Gretchen Rehberg (VIII Spokane)
Dhananjay Jagannathan (II New York)	Milquella Mendoza (IX Dominican Republic)	Tricia Lyons (III Virginia)	Jos Tharakan (VIII Idaho)
5.	Derrick Muwina (I Massachusetts)	Shawn Strout (III Washington)	
	Scott Parnell (III Virginia)	Kara Slade (II, New Jersey)	
	Sandy Wilson (II Virgin Islands)	Romulus Stefanut (IV, Tennessee)	
	Cody Maynus (VI, Minnesota)		

Cynthia Hill

Lay

Fort Worth, TX

All Saints' Fort Worth

Texas, VII



My Ph.D. is in Experimental Psychology, the field of study that examines human behavior through controlled experiments and the development of theories that guide such research. Although my field of study lies particularly in cognition and developmental issues, rather than assessment and testing, I am familiar with the issues of developing exams. The primary issues in assessment are validity and reliability, i.e. do test questions measure what they intend to measure and do they produce a consistent result. My education in these matters qualify me for the position.

As the Vice President of the Godly Play Foundation board during the pandemic, I was one of the leaders of a global team, that carried on its business. We worked collaboratively, and we worked in unity and with cohesion in the pursuit of our mission. The development of skills gained from working on a global team to achieve our goals during a difficult time will help equip me to serve on another wide ranging team.

David Miron

Lay

Lancaster, PA

St. Thomas Episcopal, Lancaster PA

Central Pennsylvania, III



My experience as a pastor, leadership team member, instructional facilitator, adjunct instructor and consultant with clergy and congregations, combined with my academic preparation has helped me identify and grow in skills related to the ministry of the Board of Examining Chaplains. In my 26 years of facilitating college courses (with adult students) in the areas of organization development and comparative religion, I have developed competency in finding ways to assess knowledge and, more importantly, understanding and, skill in reading and responding to material submitted.

Serving on the Board would provide an opportunity to put my skills, experience and knowledge of the church into the service of the church in helping to form persons who sense a call to ordained ministry. Examining Chaplains help candidates for ordination consider how to apply their vocational and academic experience and learning to real ministry.

Janeal White

Lay

Beaumont, TX

St. Mark's Episcopal Church, Beaumont, Texas
Texas, VII



I am an Indigenous professor with a doctorate in social work who has more than 20-years of professional experience with nonprofits in religious and secular spaces. My research of homelessness, poverty, and resilience have prepared me for understanding the complex interplay between extreme poverty and society.

Before entering academia, I served as a college missionary with young adults as they discerned God's call on their life. I have now served on faculty in post-secondary institutions for the past nine years where I have developed competency for designing assessment tools for students who are simultaneously facing challenges as non-traditional, minoritized, and/or marginalized students. As an educator, I specialize in creating educational environments that build on student strengths and provide equitable mechanisms for evaluation despite lived experiences of scarcity or disability. My expertise in qualitative methodologies has equipped me to assess complex theoretical concepts.

Dhananjay Jagannathan

Lay

Brooklyn, NY

Saint Ignatius of Antioch Episcopal Church
New York, II



I am an ethicist by training and profession. My academic work focuses on the history of Western philosophy (especially on Aristotle and Aquinas), contemporary moral and political philosophy, and issues at the intersection of philosophy and literature (especially tragedy).

In recent years, I have published a substantial body of public-facing theological or theologically-inflected writing, mainly in Christian magazines, about religion, politics, literature, and music, including several pieces each for Plough Quarterly, Earth & Altar, and Breaking Ground. One of my main intellectual projects, especially in joint work with my wife Tara Isabella Burton, a novelist and theologian, is the articulation of the role of beauty in our ethical lives and the place of moral judgment in our engagement with art.

I hope to bring both the intellectual standards of philosophical ethics and a conviction in the relevance of lived and embodied experience to our ethical lives to the work of the GBEC.

Andrew Armond

Priest
Hewitt, TX
St. Alban's Episcopal Church, Waco, TX
Texas, VII



I have extensive experience in areas relevant to writing and scoring the General Ordination Examination. For nearly fifteen years, I taught first-year writing to college students, guiding them through the process of composing, revising, and editing academic essays. I scored AP English Literature examinations for the College Board for thirteen years, a process that required a great deal of familiarity and comfort with scoring in a group setting according to a detailed rubric.

In addition to those qualifications, I have been writing, researching, and editing within the field of Religion and Literature for nearly twenty years. Within the church, I have served as a choirmaster, an organist, an Episcopal school chaplain, and a deacon and priest. I have taught courses in World Religions, in Bible, and in Christian Ethics. These experiences have solidified my deep engagement with the liturgy and theology of The Episcopal Church, which will serve me well as a member of the GBEC.

Giovan King

Priest
Kailua, HI
The Parish of St. Christoopher
Hawaii, VIII



I have completed three honors dissertations in the course of obtaining my A.B. (church music); M.Div. (missionary ministry); and D.Min. (dealing with decreasing church attendance). I published in the Stanford Law Review on church law and as a member of the Law Review edited professors' and classmates' publications. I edited two books. "A City Build on a Hill" was a compendium of lectures given at a national seminar and "Running the Race" included writings by myself and clergy and lay from around the world. I was part of the faculty of Virginia Theological Seminary's Summer Collegium for five years, evaluating the work of individuals who had been priests for a number of years but desired to refresh their training. While serving as Chair of the Commission on Ministry, I evaluated writings of Nominees, Postulants, and Candidates. I have mentored two individuals who are now priests and am now mentoring a nominee for the priesthood, and am a reader for his D.Min. thesis.

Mark Kowalewski

Priest

Halesite, NY

St Stephen's Episcopal Church

Long Island, II



I served a previous term on the board several years ago, I have great interest in formation for ordained ministry and Christian formation generally. I hold a PhD in Ethics and Moral Theology and have extensive experience in teaching on a congregational level. I have many years of experience as a Rector and Cathedral Dean and have had the privilege of discerning with candidates for ordination and training candidates both before ordination and as newly ordained. I also have experience as the Canon for Formation in the Diocese of Los Angeles, a member of the Commission on Ministry and the head of the Diocesan Examining Chaplains. This experience prepares me well for once again serving on the Board.

Milquella Mendoza

Priest

San Pedro de Macoris, San Pedro de Macoris

Parroquia Ayudada San Esteban

Dominican Republic, IX



God has been endowing me in the Ministry with Gifts, Talents and Competencies in the worship and practice of the Liturgy of the Church. I am called to enrich and enliven the order of worship in such a way that it is an expression that leads the congregation to a full encounter with its God. In a practical way, our liturgy communicates the message of the gospel through the call to worship, the confession of sin, the assurance of forgiveness, the message, our offerings of gratitude, and the blessing of the moving church. I am willing to serve and contribute what is necessary to the Church according to my pastoral experience of 17 years of ordained ministry.

Derrick Muwina

Priest

Cambridge, MA

Saint Peter's Episcopal Church, Cambridge

Massachusetts, I



I have extensive parochial ministry and academic training. I have served various parishes both in my native country of Zambia and in the United States. I have served multicultural/multilingual congregations. I am currently the Rector of St. Peter's Episcopal Church, in Cambridge, Massachusetts.

I hold a Bachelor's degree from University of Western Cape; a Master of Theological Studies from the Episcopal Divinity School; a Master of Sacred Theology in Mission History from Boston University; a Doctor of Philosophy in Constructive Theology and Theological Ethics from Boston University. I have seminary teaching experience having spent four years as a full-time lecturer at St. John's Anglican Seminary in Zambia teaching African Theology and Hebrew Scriptures . In my doctoral studies, I taught courses in Christian Ethics and the Ethical Leadership. I wrote my doctoral dissertation on Christian Humanism with a focused on the ethics of human dignity, non-violence, and economic justice.

Scott Parnell

Priest

Irvington, VA

Ware Church

Virginia, III



I believe in emphasizing the intellectual tradition of Christianity. Before moving into parish ministry, I taught Systematic Theology, Church History, and Scripture as a lay and then an ordained person in Episcopal Schools across the county - it was a joyful exercise in taking complex ideas and making them accessible to middle and high school students. The most recent school, Christchurch School (VA), emphasized a differentiated skills-based assessment model. My experience crafting assessments to meet students with different learning types and abilities was essential: God makes us all different, so we should have multiple ways for students to demonstrate what they've learned. Just as the secular-education world is evolving, seminary education is evolving, which implies that GOE assessments should be evolving, too. Bringing the experience of crafting skills-based differentiated evaluations (and the practice of assessing them) would contribute to the work of the GBEC. I have also been appointed to the Diocese of Virginia Commission on Ministry and Board of Examining Chaplains.

Sandy Wilson

Priest

St Thomas, Virgin Islands

Cathedral Church of All Saints

The Virgin Islands, II



I bring a spirit deeply committed to journeying with those preparing for ministry in a changing church, having taught, coached and mentored seminarians and newly ordained clergy for over 40 years. My passion has been to give students a chance to contextualize the theology that they read in settings that make sense for the ministry settings in which they may find themselves. I have been privileged to prepare examinations for seminarians, to tutor and teach students preparing for ministry and to be a listening ear and coach to many others. It would be my privilege to be a part of the GBEC Team. I bring passion, experience, compassion and rigor to this enterprise and would hope that my wide ranging experience of ministries from parish priest, to college chaplain, to seminary teacher, to creative liturgist, to church leader would give me the insight needed to prepare and read examinations fairly and with some cultural competence having served all sizes and ethnicities over these years.

Cody Maynus

Priest

Northfield, MN

All Saints, Northfield

Minnesota, VI



As a parish priest and chaplain to college students, it has been my privilege to walk alongside people from every walk of life during moments of profound joy and absolute heartbreak. I love The Episcopal Church and I want our clergy to be adequately prepared to meet the needs of the whole people of God. This looks like nurturing clergy who embody both keen intellect and pastoral sensitivity. My academic work (MA, Collegeville) is in monastic studies (history and spirituality) and liturgy. I previously served as the Canon for Formation in the Diocese of South Dakota and helped construct the formation process for vocational deacons in that diocese. I am currently serving on a design team in Minnesota working to create a 'reading for orders' process to form clergy for whom seminary would not be an attainable option. I have mentored three seminarians and two transitional deacons and have served as a spiritual director and confessor for others in formation.

Scott Bader-Saye

Lay
Austin, TX
St. Julian of Norwich
Texas, VII

I have been serving on the GOE ethics question-writing committee for the last four years. I have found that service to be meaningful and important. I am a seminary professor and would bring that educational experience to this work. I am committed to theological education, and I would be honored to serve in this capacity.



Kirsten Guidero

Priest
Marion, IN
Gethsemane Episcopal Church
Northern Indiana, V

With over seven years of experience teaching theology and a desire to give back to my beloved ecclesial home through clergy formation, I am delighted to be considered for this important role. The competencies I bring include a deep love of theology as a discourse enlivened by being practiced in everyday life and through dialogue with other disciplines. I am skilled at creating curricula to achieve this aim, including developing innovative assessment strategies that empower active learning. I am also proficient in designing pedagogies that integrate anti-oppressive approaches to evaluation. I hold significant experience working independently and collaboratively in educational and ministry contexts as well as in facilitating teams. As a second-career theologian who first worked as an editor, I am gifted at managing projects to achieve both overarching goals and important details. I hope to use my expertise to equip clergy for building the courageous, inclusive church the world deserves.



David Jackson

Priest
Kapaa, HI
All Saints'
Hawaii, VIII



I have previously served as a member on the Joint Nominating Committee for the Election of the Presiding Bishop 2012-15, which resulted in the election of Presiding Bishop Michael Curry.

GOE Reader: I served as a Reader of the national GOE's in 2008 and 2009.

I am currently the Chief Instructor in Bible and Church History in the Diocese of Hawa'i local formation program (via the Iona Institute and SSW).

I was ordained in the Church of England (Diocese of Oxford) in 1995, and have served in TEC for over 20 years in churches, Episcopal school chaplaincy, and as Dean and President of Bloy House (the local formation program in the Diocese of Los Angeles). My experience in the wider Anglican Communion gives me a more global point of view to offer.

Patricia "Tricia" Lyons

Priest
Alexandria, VA
Virginia Theological Seminary, St. Clement Episcopal Church,
Alexandria, VA
Virginia, III



I spent 20 years after Divinity School as a high school teacher of Latin, Religion and AP History, and served as a lay chaplain in Episcopal schools. I was very involved in the National Association of Episcopal Schools as keynoter, consultant and content writer.

One of my constant curiosities and efforts with colleagues was about how we assess religious education and formation. When I started teaching in Episcopal schools, I was stunned that most religion classes/retreats/faith-informed community service are not graded, evaluated or assessed in any way to see if what we teach actually forms the learners with Episcopal values, Prayer Book or habits of liturgy/prayer. Even in pluralistic learning communities, it should be possible to both engage students respectfully with Episcopal teaching and find ways to assess the learning. I wrote a doctoral dissertation and book on assessing adolescent faith development. Finding ways to evaluate and assess spiritual learning/growth is my passion.

Shawn Strout

Priest

Alexandria, VA

Trinity Parish, Washington DC

Washington, III



I would be honored to serve on the GBEC. I have been a question writer for the worship area for three examination periods and have enjoyed that process. As the Assistant Professor of Worship, Associate Dean of Chapel, and Director of Assessment at VTS, I have experience with residential seminary both as a faculty member and an administrator. Furthermore, I served as an adjunct professor in worship for the Stevenson School for Ministry in the Diocese of Central Pennsylvania for six years, giving me additional experience with non-residential theological education. I have taught courses on-site, online, and in hybrid formats. I have been privileged to teach students from as close as Virginia to as far away as India and Taiwan. These experiences have given me a deep appreciation for the breadth of theological education in the Episcopal Church and the Anglican Communion. This breadth of experience will allow me to recognize the various contexts and diverse backgrounds that students embrace.

Kara Slade

Priest

Princeton, NJ

Trinity, Princeton

New Jersey, II



For the past 6 years, I have been honored to serve on GBEC. As the current chair of the ethics evaluation team, and the immediate past vice-chair of the Board, I have been able to bring my academic experience to the composition and the evaluation of the GOE. I currently serve as the Anglican Studies instructor at an ecumenical seminary, and have also taught in several diocesan schools for ministry. The world of theological education is changing rapidly, and yet the church is called to ensure that the canons are followed and that those following all paths to ordination meet all canonical requirements for proficiency. We are also called to treat each person taking the GOE with care, extending the same pastoral sensitivity to them as we hope they will extend to others in their own ministries.

Romulus Stefanut

Lay
Sewanee, TN
Chapel of the Apostles
Tennessee, IV



My motivation for seeking this position is threefold, driven by my extensive doctoral-level training in Biblical Studies, an unwavering passion for fostering critical biblical literacy, and a sincere desire to enhance the proficiency of our current students and future priests in this domain.

To begin with, I obtained my Ph.D. in Biblical Studies from the University of Chicago, a distinguished program renowned for its comprehensive focus on both the Hebrew Bible and the New Testament. Prior to achieving Ph.D. candidacy, I successfully navigated seven rigorous six-hour doctoral exams encompassing both Testaments, their Jewish and Graeco-Roman contexts, as well as proficiency in the original languages of Hebrew and Greek. This robust preparation has equipped me with the scholarly tools necessary for in-depth analysis of the Holy Scriptures, incorporating linguistic, historical, and cultural exegetical skills.

Cathleen Bascom

Bishop
Topeka, Kansas
Kansas, VII



I am primarily interested in how we mold faith leaders for a changing, yet inquisitive 21st-century population from the rich Anglican theology and church traditions we cherish. The GOE's can be one way of gaining a picture of how new clergy integrate academic study with the issues of today. I believe that we need to consider some revision of both form and content of the exams to bear the most fruitful assessment.

I was ordained in 1990 and hold numerous degrees, mainly in English Literature, Creative Writing, Divinity and Homiletics. I taught under-graduate students Biblical Studies at a Lutheran-tradition college for a few years. I have been a bishop for nearly five years, and do actively engage GOE results and new models of forming clergy for ministry in our diocese.

Nicholas Knisely

Bishop
Providence, RI
Rhode Island,



As a former university instructor, COM member in previous dioceses and having served now for over a decade as bishop, I am interested in how best to create a fair, equitable and accurate exam that will both identify the strengths of ordinands and areas where additional support will be needed.

This is becoming particularly important across the wider church as the traditional residential seminary program is becoming a less common format for formation. The local ministry schools and online training programs have unique strengths but also open up the possibility of a less standardized preparation.

The Board of Examining Chaplains, particularly as it creates the testing tools that are mandated by the canons, will have an outsized role to play in responding and supporting to these new formation modalities. I believe my background will be of use in doing this work.

Gretchen Rehberg

Bishop
Spokane, WA
Spokane, VIII



I am a strong believer in formation and education for our laity and clergy, and the need for opportunities to demonstrate learnings. The work of the GBEC is an important way of setting standards and expectations for those who are called to ordained priesthood. As a former professor and now bishop I would be comfortable working to help write the GOE questions and evaluate answers.

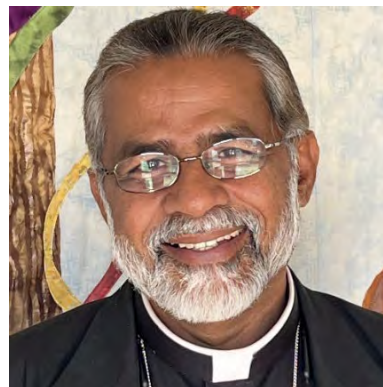
Jos Tharakan

Bishop

Boise, ID

Idaho, VIII

I have been ordained for 28 years. Being involved in churches with thousands of members attending on a Sunday to small congregations of as many as 6, I have experience dealing with different pastoral and spiritual issues of various ethnic and racial groups. I have had the privilege of serving culturally different communities from predominantly white English speakers to Spanish-speaking, Laotian, Korean, Hindi, and Malayalam-speaking groups. With 8 Units of Clinical Pastoral Education, I am also able to understand and support the intricate and complicated human experience of God. These experiences and education I have had could serve anyone entering into ordained life to expand their focus and ministry.



Joint Nominating Committee for the Election of the Presiding Bishop

TERM OF OFFICE: 3 years

NUMBER TO BE ELECTED: Five (5) lay persons and five (5) clergy persons, one of whom must be a deacon, elected by the House of Deputies; Five (5) bishops elected by the House of Bishops. Total persons to be elected: 15 Total persons on the committee: 20 (2 youth reps. to be appointed, 3 other members to be appointed to ensure diversity)

POSITION DESCRIPTION: The Nominating Committee shall (only in the event of a vacated office of Presiding Bishop):

- design a process to solicit and identify qualified nominees for the office of the Presiding Bishop;
- inform the wider Church of the process and timeline
- prepare and publish a profile for the election of the next Presiding Bishop;
- select a slate of not fewer than three (3) members of the House of Bishops;
- establish a petition process for additional nominees;
- provide for pastoral care for the nominees, their families, and their diocesan staffs;
- present to a Joint Session of the House of Deputies and House of Bishops the names of the nominees to be considered by the two (2) Houses; and
- report its actions, expenditures, challenges, and recommendations to Executive Council within three (3) months after the election.

Report to the 81st General Convention

Elect: Lay 5 Clergy 5 (including at least one deacon) Bishop 5
 Slate Needs Minimum of: Lay 8 Clergy 8 (including at least two deacons) Bishop 8
 One of the clergy must be a vocational deacon.

HoD elects lay and clergy; HoB elects bishops

Lay	Clergy (at least 2 deacons)	Bishops
Brandon Beck (VII W. Texas)	(D) Carolyn Foster (IV Alabama)	Lucinda Ashby (VIII El Camino Real)
Tivaun Cooper (II New York)	(D) Carole Maddux (IV Atlanta)	Jennifer Baskerville-Burrows (V Indianapolis)
Joanmarie Famularo (VII Texas)	Linda Grenz (I Rhode Island)	Mariann Budde (III Washington)
Robert Halleck (VIII San Diego)	Adrienne Hymes (IV SW. Florida)	Mark Lattime (VIII Alaska)
Hugh Halsey (VIII Olympia)	David Jackson (VIII Hawaii)	Jose McLoughlin (IV W. N. Carolina)
Ora Houston (VII Texas)	Luis Lopez (IX Colombia)	Jeffrey Mello (I Connecticut)
Eddie Vance (III Easton)	Alyssa Stebbing (VII Texas)	Phoebe Roaf (IV W. Tennessee)
Andrea McKellar (IV South Carolina)	Deborah White (VIII California)	Audrey Scanlan (III C. Pennsylvania)
	(D) Fatima Yakubu-Madus (V Indianapolis)	

Brandon Beck

Lay
San Marcos, TX
St Mark's, San Marcos, TX
West Texas, VII



I am a member of a dispersed monastic community through which I serve the Church as a teacher, healer, community builder, and visionary. I am an EfM mentor, a two-time servant on the GC Task Force on Ministry for People with Mental Illness, a diocesan council representative, a diocesan Mental Health Task force member, and a Community of Hope lay chaplain. I have a PhD in Adult Education and a MFA in Creative Writing which weave together with my ministry and theology to build community at the intersection of my queer/trans experience and education and support for those in recovery. I am discerning a call to ordained life.

Tivaun Cooper

Lay
Brooklyn, NY
St. Bart's NYC
New York, II



I would like to contribute my knowledge and enthusiasm to help our church. I was raised with a strong respect for the sacred traditions and a dedication to maintaining the ideals of justice and accountability. I promise to support honesty, decency, and openness in our diocesan institutions. I sincerely believe that our bishops should base all of their decisions on the highest moral principles and the tenets of our Church. I will work diligently to foster an environment of equal opportunity to be heard by our bishops. Additionally, I am aware of the significance of dealing with any instances of dishonesty or betrayals of trust within our episcopal leadership. I'm dedicated to preserving a strong accountability system in which grievances are thoroughly examined and appropriate steps are taken to protect the integrity of the system.

Joanmarie Famularo

Lay
Austin, TX
Jubilee Episcopal of Austin
Texas, VII



Served Under Bishop Walker at Grace Episcopal Day School School promoting the Episcopal Identity to our students in our education of K-8 in an ecumenical environment. All were welcome at the Wednesday Chapel Service and Monthly Communion. As a member of Jubilee Episcopal in Austin Texas fills my need to be where my Lord Jesus is every Sunday. In the songs readings and sermons that nourish my soul. Feeding my imperfections to go back to do his work in the community and return next Sunday morning and learn more of his experiences that refuel my meaning in this chapter of my life. My need to join my fellow lay leaders to pray on the new journey to select who will lead over the next nine years is personal and clear. The community of jubilee requires support compassion and support. I pray for the love and support to join.

Robert Halleck

Lay
Del Mar, CA
St. Peter's Episcopal Church Del Mar, California
San Diego, VIII



I am the retired President of Maryland Federal Bancorp, a billion dollar plus bank public company now part of Truist Corporation. I had a 30 plus year career in financial services. In my early years I was a buyer of banks for First Virginia Banks where I learned the art of financial analysis and negotiation. I hold an MBA from The University of North Carolina and BS in Finance from Norwich University. In my working career I served as trustee of several retirement funds. Obviously, as a bank president I had all departments working for me and I was, for good or bad, a very hands on manager. I believe you must know what you are supervising. I have always managed my own portfolios and mentored several successful investors. I have been an Episcopalian since 1965 and in 3 different parishes been the head of finance, endowment, and planned giving areas. I can evaluate almost any investment opportunity based in the criteria I am given. I work well with others and years ago shed my ego.

Hugh Halsey

Lay
Bainbridge Island, WA
Grace on Bainbridge
Olympia, VIII



I have a broad background of experience both in my work and in my membership of The Episcopal Church. I have been an active member in four different diocese and many different churches. I hold an MA in Christian Formation from Virginia Theological Seminary. I have a prophetic call and believe in speaking truth to power.

Our church is in the midst of a radical change. I believe that we have an opportunity to transform into a liberation focused justice oriented organization serving God and the people. However, if we choose to do nothing, our church will still be transformed into something unrecognizable within my lifetime. Even if I am not selected to serve I hope that young people are being cultivated into these positions. If we do not lift up our younger parishioners who can we expect to lead us in the years to come, and continue our work and traditions?

Thank you, be well, God bless.

Ora Houston

Lay
Austin, TX
St. James' Episcopal Church
Texas, VII



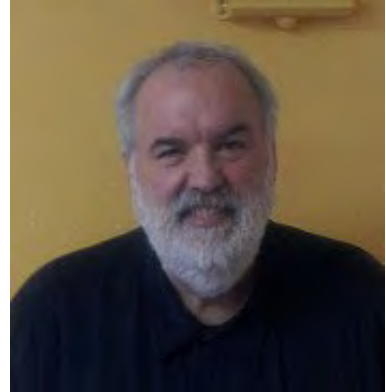
I believe that God's children call God by many names and no name. They come in all shapes, sizes, religions, beliefs or not! It has been my pleasure to be a Lay Deputy to three General Conventions and serve on various committees and commissions of the Diocese of Texas. My lay ministry from 2015 - 2019 was serving the good people of District 1 and the citizens of Austin on the City Council.

It is my belief that God can work at the extremes however, prefers to work in spaces where we humans have the capacity to be open to the movement of the Holy Spirit. More often than not found in our work in the middle.

It is my prayer that there will be no need for this Committee, however if there should be a need, I am prepared to serve.

Eddie Vance

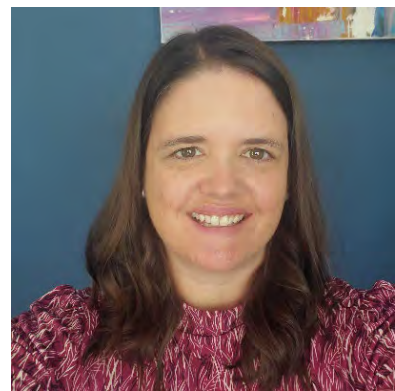
Lay
Ridgely, MD
Christ Church, Denton, MD
Easton, III



I am a servant, a team player, and a leader: Senior Warden & Vestry member (CCDenton); Diocese of Easton Nominating Committee; Trinity Cathedral Chapter (thrice); General Convention Deputation (since '97); Province 3 Council (since '01) & P3 Executive Committee; Provincial Leadership Council & Joint Standing Committee on Nominations (TEC). Served on: Rector Search Committee (CCDenton); VP Diocesan Council (Easton); Standing Committee (Easton); Nominating Committee Chair (Easton); GC Deputation Chair (Easton); Nominating Committee Chair (P3); Resolutions Committee (P3); Bishop Search & Nominations Committee (Easton); Integrity, Eastern MD Chapter, Convener & Co-Chair; Standing Commission on Ecumenical & Interreligious Relations (TEC). Also: Choir, crucifer, lector, EM, Worship Leader & Eucharistic Visitor. Progressive theologically, and otherwise. I strive to keep The Church moving forward, always am blessed, privileged & honored to serve, and ask kindly for your vote. Thank you & amen!

Andrea McKellar

Lay
Johns Island, SC
St. Stephen's, Charleston
South Carolina, IV



I would be honored to serve the church in this capacity and feel it is a good use of my skills if elected. I have served in multiple roles on diocesan staff and on a parish staff over the last 13 years including as a Diocesan Transition Officer walking the path with congregations as they call a new clergy person, explore new ministry models, and training lay leaders. I have also served on the denomination level as a member of Executive Council (2018-2024), chair of the Joint Standing Committee for Finance (2022-2024) member of the Audit Committee (2022-2024), chair of the Budget Committee (2020-2022), Task Force for Leveraging Social Media for Evangelism (2016-2018), and the Standing Committee for Lifelong Faith Formation (2013-2015).

Carolyn Foster

Deacon

Birmingham, AL

St. Mark's Episcopal Church, Birmingham

Alabama, IV



I was born, raised, and educated in Birmingham, AL. I grew up in the Smithfield neighborhood located in west Birmingham which became known as Dynamite Hill during the turbulent 60's; a reference to numerous bombings of the homes of civic rights activists in the area. My memories and experiences of that time shaped and guided my work in areas dealing with social justice issues and racial justice and reconciliation.

I have served on several state and local Boards and am currently on the staff of Greater Birmingham Ministries serving as Faith in Community Coordinator. I also serve as Tri-chair for the Alabama Poor People's Campaign. I was ordained Deacon in November 2002 serving at St. Mark's Episcopal Church. I studied Education for Ministry at the University of the South in Sewanee, TN. For over twenty years I co-chaired the Commission on Truth, Justice, and Racial Reconciliation in the Diocese of Alabama.

Carole Maddux

Deacon

Roswell, GA

Diocese of Atlanta

Atlanta, IV



As the Archdeacon for Discernment in the Diocese of Atlanta, I have many years of experience in the process of discerning God's call to individuals and the Church. I am a long time member of our Commission on Ministry and am now a permanent ex officio member. It is a great joy to me to help identify with people their call to service.

Before ordination, I also served as a Search Chair for parish during a particularly challenging time for us. Our founding rector had a sudden health crisis that required his immediate retirement during a turmoil laden time in the wider Church. I found that non-anxious leadership would be essential to our success and did my best to provide it. The next rector was a very good fit and stayed for over a decade. Finally, in my professional life as a non-profit executive, I have had a lot of experience with project management as well as Human Resources.

Linda Grenz

Priest

Washington, DC

Washington National Cathedral

Rhode Island,



I have been a member of the Presiding Bishop's staff during the tenure of two Presiding Bishops. I've served as a parish priest, interim priest, Canon to the Ordinary & as a consultant providing training & education events in multiple dioceses. I have ten years of experience serving as a transition consultant in the dioceses of

Rhode Island, Vermont & the Convocation of Churches in Europe. This experience has given me a broad understanding of life of the church both in the US & in Europe. I have also gained an appreciation for the life & work of the Presiding Bishop through my work on the Presiding Bishop's staff which included working with dioceses in Africa, the Philippines, Haiti & El Salvador & my current work with the bishop & churches of the Convocation of Churches in Europe where the Presiding Bishop serves as the primary bishop. Also, as a transition consultant, I have extensive experience in accompanying committees & candidates through the discernment process.

Adrienne Hymes

Priest

Wesley Chapel, FL

St. Paul's Episcopal Church Wesley Chapel

Southwest Florida, IV



I earned my B.A. in Rhetoric and Communications Studies from the University of Virginia which led to a corporate career in public relations and marketing for 13 years in Washington, DC and Los Angeles. Trained in client relationship development, project/budget management, strategic planning, event planning and media relations, my competencies and skills uniquely equipped me to serve as the diocesan Missioner for

Church Extension in the Diocese of Southwest FL. In this role, I restored the physical plant and defunct campus ministry as resident chaplain and director of the Episcopal Chapel Center at the University of South FL while planting a new faith community in the town of Wesley Chapel. The faith community, of which I am the first vicar, is now a vibrant, growing mission church. If elected, I will enthusiastically contribute to, and learn from, the ministry of the JNCPB, as the committee answers God's call in shaping the life of the Episcopal Church now and into the future.

David Jackson

Priest
Kapaa, HI
All Saints'
Hawaii, VIII



I have previously served as a member on the Joint Nominating Committee for the Election of the Presiding Bishop 2012-15, which resulted in the election of Presiding Bishop Michael Curry.

GOE Reader: I served as a Reader of the national GOE's in 2008 and 2009.

I am currently the Chief Instructor in Bible and Church History in the Diocese of Hawa'i local formation program (via the Iona Institute and SSW).

I was ordained in the Church of England (Diocese of Oxford) in 1995, and have served in TEC for over 20 years in churches, Episcopal school chaplaincy, and as Dean and President of Bloy House (the local formation program in the Diocese of Los Angeles). My experience in the wider Anglican Communion gives me a more global point of view to offer.

Luis Lopez

Priest
Cali, Valle del Caluca
Trinity Church
Colombia, IX



I am a married priest and father of two beautiful children; I serve with joy in the Diocese of the Episcopal Church in Colombia, convinced to bring the Good News of salvation to all people, especially those who are in the fringes of society. The congregation I serve as vicar is the Trinity Church Parish in the city of Cali, Colombia. I pastorally encourage my parish and I oversee the management of the Church's properties in the city of Cali. I am a theologian by profession and I enjoy reading. I have served my Diocese in different capacities: President of the Standing Committee, member of the Ecclesiastical Discipline Committee, and Chaplain of Public Relations. I enjoy my ministry and spending time with my family. In my spare time, I play sports.

Alyssa Stebbing

Priest

Houston, TX

St Paul Episcopal Church/Iglesia Episcopal San Pablo

Texas, VII



I am passionate about the work of racial reconciliation in the church and in our communities. I have witnessed the effects of colonialism around the world, worked with teens in trauma from Native reservations, the inner cities of the US, to orphans in Russia. My call as a priest is to be an advocate for multi-ethnic congregations that face institutionalized racism, and for the full inclusion of our LGBTQIA+ siblings in the communion of God's Church. From 2007-2008, I was an Anglican delegate to the UN Commission on the Status of Women, and subsequently served a term on the The Executive Council Committee on the Status of Women. I've learned a lot from those experiences as a lay leader that inform my ministry as a priest today. I serve as a liaison for the Diocese of Texas on Episcopal Migration Ministries and advocate for the rights of asylum seekers, refugees, and the undocumented in the community where I serve and have provided training at addressing the state legislation.

Deborah White

Priest

Alameda, CA

Grace Martinez

California, VIII



My diocese is currently in the midst of a search process. I served as the President of the Standing Committee of the diocese during the beginning of this transition period. In that role, I led the Standing Committee in launching the search process. This work included appointment of the Search Committee Co-Chairs, development of the search timeline, approval of the membership of the Search Committee, making decisions related to the structural organization of the search process, and serving as the primary "voice" of the Standing Committee during the initial announcement of the bishop's retirement and imminent search. I believe that my background as a psychologist and my administrative skills were helpful to the diocese during this time. I would like to apply these skills to working with others to consider how the Joint Nominating Committee for the Election of a Presiding Bishop might evaluate and change its process in an era in which the Church has changed considerably.

Fatima Yakubu-Madus

Deacon

Indianapolis, IN

Christ Church Cathedral

Indianapolis, V

1. Networking in the church and Community
2. Discernment
3. Advocacy and Outreach
4. Mission work in Africa



The experiences listed above give me a broader view of the church and the world at large. I served two terms on Commission on Ministry, this allowed me the opportunity to walk with aspirants in discerning their call. In addition, I was on the search committee for my current Bishop. I am currently on the board for the Funds for the Diaconate. I have been ordained since 2010 and serving my second parish.

I worked in a fortune 10 Pharmaceutical company multiple roles as a research scientist, manager of a laboratory, and operation consultant.

I have continued to be a missionary for Community Engagement and served as a deacon at Christ Church Cathedral.

Founded a non profit organization in 2008 that has given me the opportunity to collaborate with different Dioceses in the Anglican Communion

Lucinda Ashby

Bishop

Salinas, CA

El Camino Real, VIII

There are many different types of leaders at work in our church on different levels. The gifts I bring are those of diverse experience and knowledge of how the church works at every level and in multiple contexts.

These are areas I have served in: Latino Ministry, Stewardship, Liturgy, Congregational Development, Transition Ministry, Social Justice, General Convention Rules of Order, Task force on Re-engagement with Cuba, Cuba Legislative Committee, World Mission, Task force on Translation and Interpretation, Bi-lateral Committee with Mexico, and the Anglican Center in Rome. At CDSP, I taught "Ministry in a Latino Context."

I am bilingual and bi-cultural, having been raised in Costa Rica, Peru and Northern New Mexico. My background is as an educator, having served as a teacher, administrator, and educational consultant. I have a special affinity for my colleagues who serve in countries of Latin America and the Caribbean, as well as Europe.



Jennifer Baskerville-Burrows

Bishop
Indianapolis, IN
Indianapolis, V

I currently serve on the Joint Nominating Committee for the Election of a Presiding Bishop. In addition to contributing to the general work of the Committee, I've used my skills in writing, communications and social media. Working with the Communications Subcommittee, I've created accounts and content for the Instagram and Twitter feeds and assist with news updates as the nominating process unfolds. As a bishop, my experience in convening and acting quickly and prudently in unusual circumstances would serve me well on this committee if indeed it were necessary to fill the position of Presiding Bishop unexpectedly.



Mariann Budde

Bishop
Washington, DC
Washington, Ill

I have served as bishop for nearly 12 years, under two presiding bishops. I would bring a strong commitment to prayerful discernment and an open, inclusive, and engaging process to select a new presiding bishop should, God forbid, we need to elect a new leader in-between terms.



Mark Lattime

Bishop
Fairbanks, AK
Alaska, VIII

I have been serving as the co-chair of the current Joint Nominating Committee for the Election of a Presiding Bishop. It has been an honor to work for and with such a gifted group of Episcopalians focused on the leadership needs of the Episcopal Church.



Jose McLoughlin

Bishop

Asheville, NC

Western North Carolina, IV

Currently I serve on the Joint Nominating Committee for the election of the 28th Presiding Bishop of the Episcopal Church. While this has taken a great deal of time and energy to serve, it has been very rewarding and life giving. I continue to develop a deep appreciation for the vocation of Presiding Bishop and all the people who have been called to serve.

I feel my experience on the current committee will be an invaluable asset that will benefit any future work of the committee. I bring the gifts of organization, leadership, calmness in crisis, a deep passion for the ministry of the Episcopal Church.



Jeffrey Mello

Bishop

Meriden, CT

Connecticut, I

The core gifts and skills I would hope to bring to bear in serving on this committee would be listening, discernment and creating a shared vision across difference. In my work as a Licensed Clinical Social Worker, a parish priest, and now as a bishop, my desire to listen and discern has been critical to the best possible outcomes for the people I have worked with and served. In addition, my understanding of group dynamics and working with boards, vestries, councils and committees in completing a common task would be key to my work on this committee. The Presiding Bishop of the Episcopal Church is a multifaceted role that requires a wide range of gifts, for a particular time in the life of the church. I would be grateful to be a part of helping discern who it is God might need to serve in such a role, should the need arise in the next triennium.



Phoebe Roaf

Bishop
Memphis, TN
West Tennessee, IV



I currently serve on the Joint Nomination Committee for the Presiding Bishop. In this role, I have listened to the ideas of others and shared my thoughts. I have actively participated in all meetings either virtually or in person and I am chairing one of the subcommittees. I have familiarized myself with the canons regarding the duties of the Presiding Bishop and have prayerfully approached these tasks. I look forward to the opportunity to continue this important work.

Audrey Scanlan

Bishop
Mechanicsburg, PA
Central Pennsylvania, III



Having served on the JNCPB in the last triennium (2021-2024) my familiarity with the scope and sequence of the work is a key reason- and competency- for signing up to do this work again, should the committee need to be convened.

I am a clear thinker, organized, process-oriented, and am comfortable assessing both the "big picture" of a project as well as I am comfortable down in the weeds (and able to find my way out again!). I have a good facility for listening and I am a direct communicator. I enjoy writing and can bring clarity in the written word. I will use my experience and skills to help organize our work and complete our task with efficiency and faithfulness.

JOINT STANDING COMMITTEE ON PLANNING AND ARRANGEMENTS

Members

The Rev. Canon Dr. Michael Barlowe, Chair	California, VIII	2024
The Rt. Rev. Diane Jardine Bruce, Vice-Chair	Los Angeles, VIII	2024
Ms. Julia Ayala Harris	Oklahoma, VII	2024
Mr. N. Kurt Barnes	New York, II	2024
The Most Rev. Michael Curry	North Carolina, IV	2024
The Rt. Rev. Wendell Gibbs	Michigan, V	2024
The Rt. Rev. Mary Gray-Reeves	North Carolina, IV	2024
The Rev. Nancy Koonce	Idaho, VIII	2024
Mr. Bryan Krislock	Olympia, VIII	2024
The Rev. Emily Mellott	New Jersey, II	2024
Ms. Karen Patterson	Southwest Florida, IV	2024
The Rev. Canon Amy Real Coultas	Kentucky, IV	2024
The Rev. Rachel Taber-Hamilton	Olympia, VIII	2024
Ms. Patricia Wellnitz	Nebraska, VI	2024
The Rt. Rev. Terry White	Kentucky, IV	2024

Mandate

Joint Rules of Order IV

1.

a. There shall be a Joint Standing Committee on Planning and Arrangements for the General Convention, which shall have responsibility between Conventions for the matters indicated by its title. The Committee shall be composed, ex officio, of the Executive Officer of the General Convention, the Vice-Presidents, Secretaries, and Chairs of the Committee on the Dispatch of Business of the two Houses, the Treasurer of the General Convention, the President and First Vice-President of the Episcopal Church Women, the General Convention Manager and one Presbyter or Deacon and one Lay Person appointed by the President of the House of Deputies. In the case of a General Convention for which a meeting site has been selected, the Committee shall also include the Bishop and the General Chairman of Arrangements of the local Committee of the Dioceses in which that General Convention shall be held.

b. It shall be the duty of the Committee to consult with the Presidents of the two Houses, the Chairs of the Joint and Standing Committees and Commissions, Boards and Agencies of the General Convention, the Executive Council, and such other representative bodies as it may deem necessary, in the study and determination, prior to any meeting of the General Convention, of the arrangements for, and the nature of, the Agenda thereof, to be recommended by it to the General Convention for such meeting.

c. It shall be the further duty of the Committee to take such action as may be provided by Canon for the selection of sites for meetings of the General Convention.

d. The Committee shall have an Executive Committee composed of the Presidents of the two Houses, the Chair of the Committee, the Executive Officer of the General Convention, the Treasurer of the General Convention, and the General Convention Manager.

Summary of Work

The Joint Standing Committee on Planning & Arrangements met four times during this shortened biennium: December 12, 2022, March 23, 2023, June 6, 2023, and February 6, 2024. They began their work by briefly reviewing the 80th General Convention before moving on to planning the 81st General Convention and the 82nd General Convention site selection process.

The Committee approved the DRAFT agenda for the 80th General Convention including setting the length, the dates of the joint sessions, and the election of the next Presiding Bishop. The Anniversary Celebration for the Episcopal Church Women was also added to the official draft schedule. A resolution clarifying the daily schedule of General Convention is included in this report for consideration at General Convention.

With the consent of the full committee a small group visited the final three cities hoping to be selected for the 81st General Convention. The small group reported back to the full committee their findings and recommendations, and the committee voted to recommend Phoenix in the Diocese of Arizona as the site of the 2027 General Convention. The recommendation moved through the consent process directed by the Canons and the recommendation was approved.

The Committee also met to select the cities that would be presented by resolution to the 81st General Convention selecting the potential cities for the 83rd General Convention in 2030. The committee approved the resolution, and it is included in this report for consideration this summer.

The members of the joint Standing Committee on Planning and Arrangements manage multiple General Convention details at any given time. They review the most recently completed Convention, actively plan the next General Convention, while finalizing the site and selecting possible sites for the next two Conventions. As the hospitality industry changes, and as the Church itself changes, this committee moving forward will review the canonical process of planning and arranging General Convention to ensure plans are made intentionally with the priorities of the Church in mind.

Proposed Resolutions

A001 General Convention Daily Agenda

Resolved, That the 81st General Convention function through the following activities:

1. Formal legislative sessions of the two Houses;
2. Joint sessions for presentations of the proposed budget and the Presiding Bishop Nominees;
3. Meetings of the legislative committees of the two Houses; and
4. Open Hearings to be conducted, as needed, by legislative committees

And be it further

Resolved, That the schedule and daily timetable of the 81st General Convention held in Louisville, Kentucky be:

Thursday, June 20, 2024

11:00 am -4:00 pm Senior Volunteer Gathering & Training

Friday, June 21, 2024

9:00 am – 6:00 pm Registration & Deputy Certification

11:00 am – 2:00 pm Legislative Committees Officers Training

4:00 pm – 6:00 pm Joint Nominating Committee for the Election of the Presiding Bishop Meet the Nominees

Saturday, June 22, 2024

9:00 am – 5:00 pm Registration & Deputy Certification

2:00 pm – 3:00 pm Presiding Bishop/ President of the House of Deputies Presentation to General Convention

3:30 pm – 5:00 pm Orientation for Bishops & Deputies

7:00 pm – 9:00 pm Revival

Sunday, June 23, 2024

7:00 am – 8:00 am Deputy Certification

8:30 am – 10:30 am Opening Eucharist

11:00 am - 12:00 pm Legislative Session

1:00 pm – 1:30 pm Deputy Certification

2:00 pm – 6:00 pm Legislative Session

7:00 pm – 9:00 pm Episcopal Church Women 50th Triennial Anniversary Party

Monday, June 24, 2024

7:00 am – 7:30 am Deputy Certification

9:00 am – 10:00 am Morning Prayer

10:30 am - 12:00 pm Joint Session on the Budget

1:00 pm – 1:30 pm Deputy Certification

2:00 pm – 6:00 pm Legislative Session

7:00 pm – 9:00 pm Diocese of Kentucky Night

Tuesday, June 25, 2024

7:00 am – 7:30 am Deputy Certification

9:00 am – 10:00 am Morning Prayer

10:30 am - 12:00 pm Joint Session on Presiding Bishop Nominees

1:00 pm – 1:30 pm Deputy Certification

2:00 pm – 6:00 pm Legislative Session

Wednesday, June 26, 2024

7:00 am – 7:30 am Deputy Certification
8:30 am – 10:30 am Holy Eucharist
11:00 am Presiding Bishop Election
11:00 am - 12:00 pm Legislative Session
1:00 pm – 1:30 pm Deputy Certification
2:00 pm – 6:00 pm Legislative Session
7:00 pm – 9:00 pm Reserved for Legislative Session

Thursday, June 27, 2024

7:00 am – 7:30 am Deputy Certification
9:00 am - 12:00 pm Morning Prayer & Legislative Session
1:00 pm – 1:30 pm Deputy Certification
2:00 pm – 6:00 pm Legislative Session
7:00 pm – 9:00 pm Reserved for Legislative Session

Friday, June 28, 2024

7:00 am – 7:30 am Deputy Certification
8:30 am – 10:30 am Holy Eucharist
11:00 am - 12:00 pm Legislative Session
1:00 pm – 1:30 pm Deputy Certification
2:00 pm – 6:00 pm Legislative Session
6:00 pm Sine Die

A002 Site for the 83rd General Convention

Resolved, That the following sites be considered for the 83rd General Convention (2030): Kansas City, Missouri (Diocese of West Missouri); Minneapolis, Minnesota (Diocese of Minnesota); Pittsburgh, Pennsylvania (Diocese of Pittsburgh); Portland, Oregon (Diocese of Oregon); and San Juan, Puerto Rico (Diocese of Puerto Rico).

STANDING COMMISSION ON ECUMENICAL AND INTERRELIGIOUS RELATIONS

Membership

The Rt. Rev. R. William Franklin, <i>Chair</i>	Western New York, II	2024
The Rev. David Simmons, <i>Vice-Chair</i>	Milwaukee, V	2027
Dr. Lucinda Mosher, <i>Secretary</i>	Florida, IV	2027
Ms. Erin Wolf, Clerk	Fond du Lac, V	2024
Dr. Liza Anderson	Minnesota, VI	2024
The Ven. Dr. Walter Baer	Convocation of Episcopal Churches in Europe, II	2027
Dr. Michael Booker	Missouri, V	2027
El Rvdo. Ramón Canela	Dominican Republic, IX	2024
Dr. Mary Caroline Cravens	Atlanta, IV	2024
The Rt. Rev. Peter Eaton	Southeast Florida, IV	2024
The Rt. Rev. Mark Edington	Convocation of Episcopal Churches in Europe, II	2027
The Rt. Rev. Robert Fitzpatrick	Hawai'i, VIII	2027
The Rev. Dr. Kirsten Guidero	Northern Indiana, V	2024
The Rt. Rev. Gayle Harris	Virginia, III	2024
Dr. Elizabeth Jordan	Eastern Michigan, V	2024
Prof. Willis H. A. Moore	Hawai'i, VIII	2027
Mr. Daniel Pigg	West Tennessee, IV	2027
Dr. Eugene Schlesinger	El Camino Real, VIII	2027
Ms. Ellen Singer	Texas, VII	2024
The Rev Canon Dr. C. Denise Yarbrough	Rochester, II	2024
Ms. Julia Ayala Harris, <i>Ex Officio</i>	Oklahoma, VII	
The Most Rev. Michael B. Curry, <i>Ex Officio</i>	North Carolina, IV	
The Rev. Dr. Deborah Jackson, <i>Liaison of Executive Council</i>	Florida, IV	
The Rev. Margaret Rose, <i>Staff</i>		

Acknowledgements

The SCEIR would like to thank and acknowledge the work and support of The Rev. Margaret Rose, The Rev. Canon Charles Robertson, The Rev. Dr. Elise Johnstone (TEC-PCUSA Dialogue Chair), Ms. Martha Gardner (Standing Commission on World Missions), and the Ecclesiology Committee of the House of Bishops.

Mandate

2022 - Canon I.1.2.n.5

5. A Standing Commission on Ecumenical and Interreligious Relations. It shall be the duty of the Commission to:

- i. Coordinate and encourage the work of church unity among Christian partners and collaboration and peacebuilding with interfaith partners, conciliar, and interfaith organizations.
- ii. Recommend policies and strategies to the General Convention for the affirmation and development of ecumenical and interreligious partnerships.
- iii. Collaborate with ecumenical and interreligious partners, conciliar and interfaith bodies to develop tools which address issues of power, racial justice, colonialism, imperialism, and the historical racial bias in ecumenical endeavors.
- iv. Support Diocesan and local engagement in interreligious and ecumenical ministry.
- v. Encourage theological work that recognizes the current and future ecumenical and religious landscape, contextual theologies and partnerships with conciliar bodies and others to address the Gospel issues of unity, justice, and peace, and to respond as requested to Conciliar, ecumenical, or other interreligious documents.
- vi. In collaboration with the churchwide Office on Ecumenical and Inter-religious relations, develop and recommend to the General Convention comprehensive and coordinated policies and guidelines for inter-religious relations and ecumenical dialogues and conversations.
- vii. Recommend strategies and policies to General Convention for training and leadership development, with networks, diocesan ecumenical officers, faith-based bodies within and beyond the Episcopal Church
- viii. Study the needs and trends of the ecumenical and interreligious landscape, to support and encourage the development of resources for ecumenical and interreligious formation.

Summary of Work

Meetings

- November 13–17, 2022, Baltimore, Maryland
- December 15, 2022, Zoom
- April 10, 2023, Zoom
- August 30, 2023, Zoom
- October 11–14, 2023, Baltimore, Maryland
- November 13, 2023, Zoom
- January 23, 2024, Zoom

STANDING COMMISSION STRUCTURE AND AREAS OF FOCUS

Following initial discussion on the work that is and should be happening under this umbrella, four subcommittees were developed to address the mandate: Theology – Ecumenical; Theology – Interreligious; Global/Anglican; Constitutions and Canons. Additional ecumenical and interfaith projects are being acted upon by individuals and/or TEC staff members.

THEOLOGY – ECUMENICAL (KIRSTEN GUIDERO, CHAIR)

This subcommittee convened to consider how best to support TEC ecumenical endeavors through current issues with four dialogue and full communion partners: the Evangelical Lutheran Church in America (ELCA), the United Methodist Church (UMC), the Evangelisch-Lutherische Kirche in Bayern (ELKB), and the Presbyterian Church-USA (PCUSA). The pressing matter of discerning towards full communion with the ELKB brought members of this subcommittee to consult with members of the House of Bishops and historical theologians on understandings of the episcopacy. They developed a full resolution with supporting documents to share with the House of Bishops, General Convention deputies, and the Episcopal Diocesan Ecumenical and Interreligious Officers (EDEIO), the full texts of which are appended to this report. Concerning the UMC dialogue, the subcommittee’s resolution and accompanying document focused on articulating wholehearted support for that ecclesial community as it continues to discern its polity structure and theology through a season of intense division. For our full communion partner the ELCA, the subcommittee developed a resolution that clarifies the interchangeability of deacons, attached. For this stage of dialogue and exploration of partnerships with the PCUSA, no tasks were necessary for the theology subcommittee. Rather, the subcommittee on constitutions and canons began preparing resolutions that would support future work towards full communion.

THEOLOGY – INTERRELIGIOUS (LUCINDA MOSHER, CHAIR)

During this biennium, the Interreligious Relations Subcommittee undertook and completed a thorough revision of three documents memorialized by the 80th General Convention. This subcommittee's three resolutions, if passed, will bring about adoption of *Holding Difference Together: Episcopal Theological and Practical Guidelines for Interreligious Relations*, plus *Christian-Jewish Relations: Theological and Practical Guidance for Episcopalians* and *Christian-Muslim Relations: Theological and Practical Guidance for Episcopalians* for churchwide use in developing and maintaining interreligious conversation or collaboration.

GLOBAL/ANGLICAN (MARK EDINGTON, CHAIR)

A subcommittee of the Commissioned gathered to consider how best the Episcopal Church might respond to recent developments in the Anglican Communion. Historically, the work of the General Convention on Anglican Communion matters has been the remit of the Standing Commission on World Mission; yet it seems evident that the years ahead may bring about a wholesale reconsideration of the instruments of Communion and the basic expectations of relationships between the independent, autonomous provinces of the Anglican Communion. Together with colleagues from the Standing Commission on World Mission, this subcommittee developed a draft resolution to propose to the 81st General Convention calling for the creation of a Task Force to study Anglican Communion Relationships, with particular emphasis on (1) conducting a study of issues impairing relationships of Communion between The Episcopal Church and other Provinces of the Anglican Communion, and the development of proposals for engaging constructively across differences; (2) proposing systematic ways for the Episcopal Church to respond to theological statements issued by the instruments of Communion; (3) proposing a means of establishing clear guidance for representatives of the Episcopal Church to the Triennial meetings of the Anglican Consultative Council; and (4) supporting the work of the offices of Ministry Beyond the Episcopal Church as it relates to relationships with our Anglican Communion partners.

CONSTITUTIONS AND CANONS (DAVID SIMMONS, CHAIR)

The Primary role of the Constitutions and Canons Subcommittee for this triennium has been examining the Constitutions and Canons for ways to deepen ties with other Christian Denominations. The resolutions for a constitutional change and canon to enable "Limited Ecumenical Partnerships" (LEP) such as the Church of England has is a result of that process. The LEP concept, if implemented, will enable further collaborative mission with other Christian denominations while maintaining the distinctives of Episcopal Ecclesiology.

RESOLUTIONS REFERRED BY THE 80TH GENERAL CONVENTION

Resolutions Referred to the Task Force to Coordinate Ecumenical & Interreligious Work

Resolution 2018-C059 Commend Dialogue with the Evangelical Church in Bavaria

Resolved, That the 79th General Convention approve and commend the existing relationship between the Convocation of Episcopal Churches in Europe (Convocation) and the Evangelisch-Lutherische Kirche in Bayern (ELKB) (Evangelical Church in Bavaria); and be it further

Resolved, That the 79th General Convention approve and commend the process of exploring deeper relations and the dialogue toward full communion between The Episcopal Church and the ELKB.

Please refer to the “Proposed Resolutions” section for Resolution text and subsequent explanation, as the language has been updated from the previous Referred Resolution from the 80th General Convention.

PARTNERS IN WORK

By its definition, this Standing Commission does not stand alone. To accomplish the mandate of General Convention, the SCEIR is connected to other parts of TEC engaged in interfaith and/or ecumenical efforts. The closest relationship is with the TEC Office of Ecumenical and Interreligious Relations. Their work, as well as the breadth and depth of their knowledge, has been a crucial part of this effort.

Other partners include the Offices of Team Beyond, the Episcopal Church, work at the United Nations, the Episcopal Diocesan Ecumenical and Interreligious Officers (EDEIO) group, the National Workshop on Christian Unity, Churches Uniting in Christ (CUIC), the National Council of Churches (NCC), the World Council of Churches (WCC), Shoulder-to-Shoulder, Religions for Peace USA, Christian Churches Together (CCT), and the other various task forces, commissions, committees, and dialogue groups who are engaged in specific relationships, such as the TEC-PCUSA dialogue.

Blue Book Report of the On-going Work of Ecumenical and Interreligious Relations

Submitted to the Standing Commission on Ecumenical and Interreligious Relations

Summary of Work

Churches Uniting in Christ

Along with eight fellow churches, The Episcopal Church remains an active member of Churches Uniting in Christ (CUIC), the successor to the Consultation on Church Union. This multilateral dialogue continues to work toward interchangeability of ministry among its members and to eliminate the scourge of racism as a barrier to unity.

National Council of Churches

The National Council of Churches is an ecumenical body of 37 communions representing Protestant, Anglican, Orthodox, evangelical, historic African American, and historic Peace churches. Its two current priorities are combating mass incarceration and the racial bias it carries and working to foster interreligious peacemaking. The NCC also provides a vehicle by which The Episcopal Church engages in interreligious dialogue with Jewish and Muslim partners. Episcopalians are in leadership in the Convening Tables and ongoing anti-racism work, Friendship Press and the NRSVue, and the governing board.

World Council of Churches

The World Council of Churches is the most inclusive worldwide ecumenical body, composed of Orthodox, Anglican, and Protestant Churches from more than 110 countries. The WCC's 11th Assembly (governing body) took place in Karlsruhe, Germany in the summer of 2022. Daily prayer, Bible study, and fellowship marked the Assembly, which also addressed topics including the politicization of religion, rights of religious minorities, reunification of the Korean peninsula, and just peace, especially in Palestine and Israel and Armenia as well as Ukraine. Episcopalians serve on the Central Committee and four delegates attended the Karlsruhe event.

Christian Churches Together in the USA

Christian Churches Together (CCT) is the broadest ecumenical organization in the United States, with participants from the Roman Catholic, Anglican, Orthodox, mainline, evangelical, and Pentecostal branches of the Christian family. CCT hosts an annual forum as well as webinars and educational forums throughout the year. The 2023 Forum topic was "Baptism: Waters that Unite, Waters that Divide." The Episcopal Church was a founder of CCT and continues to serve on the Steering Committee.

Episcopal Diocesan Ecumenical and Interreligious Officers Network

The Episcopal Diocesan Ecumenical and Interreligious Officers (EDEIO) is the network of Ecumenical Interreligious Officers appointed by Diocesan bishops. EDEIO is an organizer of the National Workshop on Christian Unity. Throughout the year, EDEIO hosts network calls among EDEIO officers of the Episcopal Church, supporting their local work and offering engagement and information on church-wide ecumenical/interreligious work.

Philippine Independent Church-Episcopal Church Concordat Council

Since 1961, the Philippine Independent Church (PIC), also known as the Iglesia Filipina Independiente (IFI), and The Episcopal Church have worked together under a concordat of full communion. Meetings during the current triennium have established common mission goals as well as theological dialogues. Ongoing conversation regarding the work of the IFI in the United States and partnerships in the Philippines, as well as participation of the Obispo Maximo in Episcopal Church meetings, continue to deepen the partnership. There are currently two IFI dioceses in the United States who work closely with Episcopal Church partners in Southwest Florida, Chicago, California, and Hawaii.

Religions for Peace USA

RFPUSA is a national interreligious affiliate of Religions for Peace, which supports a network of nearly 100 national and regional global affiliates. Religions for Peace USA is the largest and most broadly-based representative multi-religious forum in the United States, with participants from about 50 religious communities, representing each of the major faith traditions. The organization identifies shared commitments among religious communities in the U.S., enhances mutual understanding among these communities, and facilitates collaboration to address issues of common concern. The Episcopal Church serves on its Steering Committee and is an active partner in its mission.

Shoulder to Shoulder

The Shoulder to Shoulder Campaign is a national multifaith coalition of religious denominations and faith-based organizations who are committed to ending anti-Muslim hatred, discrimination, and violence in the United States of America. The Shoulder to Shoulder Campaign connects, equips, and mobilizes faith communities in the United States of America as strategic partners in countering, addressing, and preventing anti-Muslim hatred, discrimination, and violence. The Episcopal Church is an active partner in this coalition and also serves on its Steering Committee. Most recently, The Episcopal Church hosted Shoulder to Shoulder's flagship "Faith Over Fear" training at It's All About Love: A Festival for the Jesus Movement.

International Anglican Communion Ecumenical Dialogues

The Episcopal Church is represented on the Anglican Communion's international dialogues. These include the Anglican-Orthodox Theological Dialogue (The Rev. Dr. Christopher Beeley, representative); the Anglican-Oriental Orthodox Dialogue (Dr. Liza Anderson, representative); and the Anglican-Roman

Catholic International Commission (The Rev. Dr. Stewart Clem, representative). Inter-Anglican Standing Commission on Unity Faith and Order (The Rev. Dr. Katherine Sonderegger and The Rt. Rev. Eugene Sutton, representatives).

Blue Book Report of the Moravian Episcopal Coordinating Committee

Submitted to the Standing Commission on Ecumenical and Interreligious Relations

Members

The Rev. Maria Tjeltveit, Chair	Bethlehem, III	2024
Mrs. DeDreana, Freeman	North Carolina, IV	2024
The Rev. Dale Grandfield	Bethlehem, III	2024
The Rt. Rev. Samuel Rodman	North Carolina, IV	2024
The Rev. Barbara Seward	Bethlehem, III	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024

Representation at General Convention

Bishop Samuel Rodman will be present at General Convention.

Moravian Members

The Episcopal members of the Moravian-Episcopal Coordinating Committee worked with the following Moravian members:

The Rev. Derek French (Northern Province), Co-Chair

The Rt. Rev. M. Blair Couch (Northern Province)

The Rt. Rev. Sam Gray (Southern Province)

The Rev. Fran Saylor (Southern Province) through April 2023

The Rev. Scott Rainey (Southern Province) beginning June 2023

Mandate

Resolution 2018-A036

Resolved, That the 79th General Convention joyfully affirms the continuation of the ecumenical dialogues in which The Episcopal Church is engaged: the Presbyterian Church (USA)-Episcopal Dialogue; the Anglican-Roman Catholic Dialogue (ARCUSA), noting particularly a renewed round of conversations; and the work toward full communion with the United Methodist Church; and be it further

Resolved, That this Convention joyfully affirms the continued coordinating committee work with our full communion partners, the Evangelical Lutheran Church in America and the Moravian Church (Northern Province and Southern Province); and be it further

Resolved, That this Convention celebrates with joy and gratitude the deepening international relationship among the leaders of The Episcopal Church, the Evangelical Lutheran Church in America, the Anglican Church of Canada, and the Evangelical Lutheran Church in Canada, and commends the members of these churches for the work they have done together and the statements and study documents they have jointly issued.

Summary of Work

Work between the last Blue Book Report and the new triennium

Since the last Blue Book Report (February 2020), The Moravian-Episcopal Coordinating Committee (MECC) had a virtual 10th Anniversary Celebration of Full Communion Between the Moravian Church, Northern and Southern Province, and the Episcopal Church, on February 10, 2021, and started a Racial Reconciliation Working Group, in April 2021. At the General Convention held in July 2022, MECC distributed over two hundred copies of the Moravian Daily Texts, along with a one-page document describing our full communion relationship, to deputies and bishops.

Work during this triennium

Meetings

During this triennium, MECC had three meetings:

- February 21, 2023, Zoom meeting
- May 1-3, 2023, In-person meeting in Bethlehem, PA
- September 13, 2023, Zoom meeting

Two more meetings are planned before General Convention

Racial Reconciliation Working Group

Past Reckoning Webinar Series

The 10th Anniversary Celebration of Full Communion service included a commissioning for the work of racial reconciliation, which has largely shaped the work of MECC during this triennium.

The MECC Racial Reconciliation Working Group, formed in response to this commission, created a three-webinar series, *Past Reckoning: Exploring the Racial History of the Moravian and Episcopal Churches*, which aired January 25, February 1 & 8, 2023. Christopher Sikkema and Jeremy Tackett of the Episcopal Church Office of Communications worked with the Working Group to promote and host the series. Mike Reiss, of the Moravian Interprovincial Board of Communications helped us promote it to the Moravian Church. The webinars were:

- Evangelizing Enslaved People: Good News or Control?

- The Silent Protest Parade: Responses to Racial Violence and Black Leadership in the Church
- The Church and the City: Integration, Segregation, and White Flight

Over 500 people registered for the series and each webinar had over 100 live participants.

Follow-up on the webinar series includes the following:

- the webinars were posted on the Episcopal Church Ecumenical and Interreligious Relations website for 6 months;
- a survey of participants gave helpful feedback and suggestions for further webinars or activities, as well as a new member for the Working Group;
- The Racial Reconciliation Working Group is turning the series into an Adult Education offering, with shortened videos and a study guide, available October 2023;
- The Rev. Maria Tjeltveit, Chair of the Racial Reconciliation Working Group, wrote an article on the webinar series for the “Engaged History” column of *Anglican & Episcopal History*, scheduled to appear in the December 2023 issue.

Full Communion Sacred Ground

The Racial Reconciliation Working Group also promotes racial reconciliation through a full communion *Sacred Ground* program. Now in its third year, this Zoom program has had roughly 50 participants (including 7 facilitators) from the Moravian, Episcopal, and Lutheran Churches, as well as other denominations, in 2022-23 and in the series that began in August 2023. The Rev. Maria Tjeltveit is the coordinator of the groups. She wrote an article, [“Finding Full Communion on Sacred Ground”](#) which was posted on the Episcopal Church Racial Reconciliation website, in February 2023.

The Racial Reconciliation Working Group also promoted, through ENS, a Moravian Church Northern Province Racial Justice Team’s 2022 Zoom Advent Series, *A New Way of Being: Light, Wind, Healing, Home*. It featured Dr. Catherine Meeks, Executive Director of the Absalom Jones Center for Racial Healing, who had helped lead 75 Northern Province clergy in a Racial Justice Pilgrimage to Montgomery, Alabama. A number of Episcopalians participated in the Advent Series.

Document on Moravian and Episcopal congregations considering merger or closer relationships

In addition to the work on racial reconciliation, MECC interviewed the leaders from an Episcopal congregation in the Diocese of Los Angeles which had opened its doors to a neighboring Moravian church which was closing. The planned merger was not able to be sustained, partly due to the pandemic. MECC used the leaders’ reflections on the experience to create a document for Episcopal diocesan bishops and Moravian District presidents to use as a resource when Episcopal and Moravian churches are exploring merger or closer relationships. It is initially being sent to a small group of bishops and District presidents for review and comments.

Worship Working Group

At the May 2023 meeting, the work of the Racial Reconciliation Working Group was commended and encouraged to continue. A Worship Working Group was also created, to help our communions learn about each other's rich traditions in music and liturgy. It has had an initial meeting and the leaders are recruiting members from the two denominations. MECC meetings regularly include instructed Eucharists or other worship experiences to introduce and inform members about liturgical practices.

Representing the Episcopal Church at Moravian Synods

Two members of MECC, The Rt. Rev. Samuel Rodman, and The Rev. Maria Tjeltveit, attended the Northern Province Synod, June 22-24, to represent the Episcopal Church. The Rev. Maria Tjeltveit also brought greetings to the Southern Province Synod, in June 2022.

Relationships with other Coordinating Committees

MECC has reached out to other Coordinating Committees to see how there might be more collaboration among these bodies. The Moravian Church has been pushing the question of whether siloed full communion coordinating committees are the best way to live into the unity to which Christ calls us, or whether we are being called to develop a new vision of how we might work together when we share multiple full communion partners.

Through a relationship with Mitzi Budde, a member of the Lutheran-Episcopal Coordinating Committee, The Rev. Maria Tjeltveit gave a presentation about the work of MECC, "Building Beloved Community Ecumenically" to Budde's Virginia Seminary class, *Ecumenical Mission of the Church*, in March 2023.

Conclusion

The primary work of the Moravian-Episcopal Coordinating Committee is to facilitate building relationships between Moravians and Episcopalians, so that we can live into full communion and work together more effectively for Christ's mission. As the Moravian Church is not well known to Episcopalians, MECC is using the successful webinar series to explore how to use various tools--webinars, podcasts, social media, news stories—to enable our two denominations to learn about each other and enter into relationship with one another. It is blessing to work with our Moravian siblings in this creative and life-giving work.

Blue Book Report of the Anglican-Roman Catholic Theological Consultation in the United States

Members

The Rt. Rev. John Bauerschmidt, *Chair*, 2024 – Tennessee, IV
The Rev. Dr. Michael Cover, 2024 – Dallas, VII
Rev. Dr. Daniel Joslyn-Siemiatkoski, 2024 – California, VIII
Dr. John Kiess, 2024 – Maryland, III
The Rev. Charles McCarron, 2024 – Long Island, II
The Rev. Canon Dr. C. Denise Yarbrough, 2024 – Rochester, II
Ms. Julia Ayala Harris, *Ex Officio* – Oklahoma, VII
The Most Rev. Michael B. Curry, *Ex Officio* – North Carolina, IV

Changes to membership during triennium:

The Rev. Charles McCarron (2022)

Mandate:

2022 Resolution A094

Resolved, That the 80th General Convention joyfully affirms the continuation of the ecumenical dialogues in which The Episcopal Church is engaged: the Presbyterian Church (USA)-Episcopal Dialogue; the Anglican-Roman Catholic Dialogue (ARCUSA), and the work toward full communion with the United Methodist Church (UMC). And be it further

Resolved, that this Convention joyfully affirms the continuation of work of the dialogue with the Evangelical Lutheran Church in Bavaria (Evangelisch-Lutherische Kirche in Bayern) and commends the document *Sharing the Gifts of Communion* to the church for consideration. And be it further

Resolved, that this Convention joyfully affirms the continued coordinating committee work with our full communion partners, the Evangelical Lutheran Church in America, and the Moravian Church (Northern Province and Southern Province). And be it further

Resolved, that this Convention joyfully affirms our representation and participation in national ecumenical bodies, including the National Council of Churches (NCC), Churches Uniting in Christ (CUIC) and Christian Churches Together (CCT).

Preface from the Cochairs

Since 1965, the Episcopal Church and the Roman Catholic Church have sponsored a bilateral theological dialogue, the Anglican-Roman Catholic Theological Consultation in the United States of America, sometimes known as ARC-USA. As a part of this dialogue, ARC-USA has over the years produced a number of agreed statements on theological subjects of concern to the two churches, most recently a statement on “Ecclesiology and Moral Discernment” (2014). Our dialogue has taken place within the larger context of the work of the Anglican-Roman Catholic International Commission (ARCIC), contributing to and responding to the broader work of reconciliation between our churches.

In 2015 the Bishops’ Committee for Ecumenical and Interreligious Affairs of the United States Conference of Catholic Bishops, and the Most Rev. Michael Curry, Presiding Bishop of the Episcopal Church, asked ARC-USA to address the topic, “Reconciliation in Holy Scripture and Christian Tradition.” Our mandate included consideration of the theological, pastoral, and personal implications of reconciliation for our two churches. Scriptural, historical, and theological perspectives were also to be brought to bear on reconciliation, not only between the churches, but also within the churches, and in the world.

The work of this iteration of ARC-USA began in 2017, and the topic was eagerly embraced by the members of the dialogue. Participants were mindful that the theme of reconciliation was one that built upon emerging emphases of both the Archbishop of Canterbury, Justin Welby, and Pope Francis. As a broad theological theme, the topic was multi-faceted, involving not only the classic ecumenical concern for reconciliation between the churches, but also interreligious, racial, and ecological reconciliation.

This document includes an exploration of the theme of reconciliation in Holy Scripture and develops three interrelated aspects involved in reconciliation: recognition, repair, and restoration. These aspects are scripturally based but have a wider applicability within broader societal divisions. An attempt is made to speak forcefully into our present moment without losing the wider eschatological horizon of reconciliation. An addendum is also included, a liturgy of reconciliation for Episcopalians and Catholics that we hope will be useful in other contexts. We believe that our churches have learned from our ecumenical dialogue, in our search for full visible unity, and as humble learners ourselves offer these gifts for the wider work of reconciliation.

We are mindful that there are many related subjects within this broad topic that we were not able to take up. A good portion of our dialogue took place in the time of COVID-19, with its own stresses and strains that only underscored the need for reconciliation. The developing situation in Israel and Gaza in September 2023 emerged too late for us to incorporate in our work. We could not have imagined in 2015 the challenges that our world would face, or the even greater timeliness of this topic.

Furthermore, we cannot help but note that our topic’s timeliness seems more than fortuitous. Indeed, the seemingly exponential, global growth of hatred, xenophobia, antisemitism, Islamophobia,

corruption, and violence—a good bit of it religiously motivated—in the eight years since we began our work may be somewhat like the Elysian trumpet the document describes, in this case a clarion call from the Spirit to the churches to engage in an ecumenism of repentance and reconciliation, of witness to the healing power of Christ and the call of Christians to be the ministers of this healing in a world awash in pain and violence. May our work provide at least a little inspiration and encouragement for Catholics and Episcopalians to assume this task together in new ways and with a renewed sense of responsibility to the world. We believe that the work of Jesus Christ to reconcile the world to God can only be completed by human beings becoming reconciled to one another.

We are grateful to the members of the dialogue for their good work. This extraordinary group of scholars and pastors has grown together through this time. In many ways, the experience of the members of the dialogue has mirrored the topic we were discussing. As we grew in relationship, we discovered the grace of reconciliation present in our midst. We found ourselves inspired by the presence of Christ among us in the power of the Spirit. We pray that this agreed statement from members of our churches will inspire others, and bring closer that day when the world will be reconciled to God.

The Most Rev. John Michael Botean

Bishop, Romanian Eparchy of St. George in Canton, Ohio

The Rt. Rev'd John C. Bauerschmidt

Bishop of the Episcopal Diocese of Tennessee

Notes on Usage

In keeping with common ecumenical parlance, we refer in this document to our two churches, communions, and communities, and to the one Church of Christ confessed in the creeds. This marks a rough and approximate usage. The Episcopal Church describes itself both as a church and as a member of the Anglican Communion of churches. There is no precisely parallel Roman Catholic counterpart in the United States, for several reasons, though the Roman Catholic Church comprises a communion of distinct, local churches worldwide. As used here, the term “Roman Catholic” refers to all the local churches in full communion with the Bishop of Rome, and not simply the Latin Church.

Likewise in keeping with standard ecumenical and Roman Catholic parlance, we shift freely between Roman Catholic and Catholic without presuming a simple identification between the two.

Summary of Work and Meetings during the Triennium

Over fifty years ARC-USA has issued a number of agreed statements concerning a range of topics. These have included the doctrine of the Eucharist, the Ordination of Women, and a response to the Anglican-Roman Catholic International Commission's 1998 document "The Gift of Authority." Most recently in 2014 the Consultation produced the statement "Ecclesiology and Moral Discernment." The statements are collected here: http://www.usccb.org/beliefs-and-teachings/ecumenical-and-interreligious/ecumenical/ecumenical-documents-and-news-releases.cfm#CP_JUMP_106433

Since 2017, our work has centered on a new theme determined in 2014: "Reconciliation in Holy Scripture and Christian Tradition." An inter-disciplinary group of theologians and pastors were assembled as members to resource the work. The dialogue has reported on its meetings and progress to the 2018 and 2022 General Conventions.

Since our last report, the Consultation met virtually on April 15-16, 2021; as well as on November 11-13, 2021, at the Spiritual Life Center in Wichita, KS. Work continued with a virtual meeting on May 19, 2022, as well as a meeting on October 5-8 at St. Mary's Seminary in Baltimore, MD; on May 23-26, 2023, at the Maritime Institute in Linthicum Heights, MD; and a final meeting of this round of the dialogue, on November 8-11 at the Bon Secours Retreat and Conference Center in Marriottsville, MD.

Work on the agreed statement has now been completed. This document includes an exploration of the theme of reconciliation in Holy Scripture and develops three interrelated aspects involved in reconciliation: recognition, repair, and restoration. These aspects are scripturally based but have a wider applicability within broader societal divisions. An attempt is made to speak forcefully into our present moment without losing the wider eschatological horizon of reconciliation. An addendum is also included, a liturgy of reconciliation for Episcopalians and Catholics that we hope will be useful in other contexts. We believe that our churches have learned from our ecumenical dialogue, in our search for full visible unity, and as humble learners ourselves offer these gifts for the wider work of reconciliation.

We are mindful that there are many related subjects within this broad topic that we were not able to take up. A good portion of our dialogue took place in the time of COVID-19, with its own stresses and strains that only underscored the need for reconciliation. The developing situation in Israel and Gaza in September 2023 emerged too late for us to incorporate in our work. We could not have imagined in 2015 the challenges that our world would face, or the even greater timeliness of this topic.

Continuance recommendation

We recommend continuance of the Anglican-Roman Catholic Theological Consultation in the United States during the next Triennium. The Consultation has continued to engage significant theological topics of common importance to our churches, in the furtherance of the goal of full, visible unity. The ongoing work of theological dialogue is valuable to our two churches, helping to determine the extent of agreement, and the limits of disagreement.

Blue Book Report of the Episcopal-Presbyterian Dialogue

Submitted to the Standing Commission on Ecumenical and Interreligious Relations

Membership

2022-2024 Membership: The Rev. Canon Elise B Johnstone, D.Min, Episcopal co-chair; The Rt. Rev. Eugene Taylor Sutton, The Rev. Joseph Wolyniak, Dr. Michael Booker; along with The Rev. Margaret Rose, the Presiding Bishop's Deputy for Ecumenical and Interreligious Relations and EIR staff, The Rev. Salmoon Bashir, with additional support from EIR staff member The Rev. Hank Jeannel

Our Presbyterian Church (U.S.A.) counterparts are Dr. Anne Wainstein Bond, Ruling Elder, Presbyterian co-chair; The Rev. Dr. Neal D. Presa, Presbyterian co-vice chair; The Rev. Christian D. Boyd; The Rev. Robert Foltz-Morrison; The Rev. Terri Ofori; The Rev. Brian Entz; along with Dr. Y. Dianna Wright, representing the Office of the General Assembly

Summary of Work

The Dialogue members met three times in this shorter triennium: in February 1-3, 2023, in Austin, Texas, by Zoom in March 2023, and again in person in October 29-31, 2023 in Denver, Colorado at Central Presbyterian Church, Denver. The February meeting was intended to be hosted by the Seminary of the Southwest, but an ice storm caused the seminary to close, and we met at our hotel.

The Episcopal-Presbyterian Dialogue was encouraged by the passage for study of the proposed "Episcopal-Presbyterian Agreement on Local Sharing of Ministries" by both the 2022 General Convention and the 2022 General Assembly. The proposed document was shared publicly in late 2022 and early 2023 with a request for feedback, and we received numerous responses which were predominantly favorable of the proposal and offered constructive edits. The dialogue team incorporated some of the suggestions and produced a revised "Episcopal-Presbyterian Agreement on Local Sharing of Ministries." With the assistance of The Rev. David Simmons, Rector of St. Matthias Episcopal Church and Pastor of First Presbyterian Church, Waukesha, WI, a website was created to share both historic and current agreements, background information, and videos supporting the work of the dialogue and the proposal from some bishops including The Rt. Rev. Mark Van Koevering, Bishop of Lexington, The Rev. Philip Lotspeich, General Presbyter, Transylvania Presbytery, The Rt. Rev. Wayne Smith, Bishop Provisional of Southern Ohio, and most recently The Rt. Rev. Eugene Taylor Sutton of Maryland. The website WWW.PCUSA-TEC.ORG will continue to be a resource for this ecumenical work.

The Dialogue team invited The Rev. Canon Sharon Alexander, The Rev. Dr. Tom Ferguson, and The Rev. David Simmons to consult on how a path can be created for this proposal from a constitutional/canonical perspective, and the team is grateful for their time and efforts.

The Dialogue team is grateful to the SCEIR, for their reception and support of this proposal and for putting forward resolutions to make a constitutional/canonical path forward for this work, that is similar to how this work is occurring in the Church of England. It is hoped that this constitutional change will be received well by the General Convention in 2024 and again in 2027, and that the revised proposal can be approved by the 2027 General Convention.

This Dialogue also commends the report being presented to the PCUSA's General Assembly on our shared work. [Report to 2024 General Assembly TEC-PCUSA Dialogue](#)

GOALS FOR THE NEXT TRIENNIUM

- Attention to Ecumenical Digital Communities.
- Engagement of Christian bodies with which The Episcopal Church is not presently in dialogue.
- Development of guidelines for Buddhist-Episcopal, Sikh-Episcopal, and Hindu-Episcopal engagement.
- Development of a Federated Church Canon.
- Work on multireligious fluency as an aspect for theological education.

Proposed Resolutions

A037 Accepting the agreement "Sharing the Gifts of Communion" between The Episcopal Church and the Evangelical Lutheran Church in Bavaria

Resolved, That the 81st General Convention of The Episcopal Church receive and commend *Sharing the Gifts of Communion* as set forth following as the basis for a relationship of full communion to be established between The Episcopal Church and the Evangelisch-Lutherische Kirche in Bayern (ELKB) (Evangelical Lutheran Church in Bavaria); and be it further

Resolved, That the 81st General Convention of The Episcopal Church accept the affirmation of *Sharing the Gifts of Communion (Augsburg Agreement)* that our churches have the basis for full communion with each other to be inaugurated through a service of reconciliation between the two churches; and be it further

Resolved, That the Presiding Bishop appoint four members to the Continuation Committee called for in *Sharing the Gifts of Communion (Augsburg Agreement)* to represent The Episcopal Church in the ongoing work of furthering our relationship; and be it further

Resolved, That Title 1, Canon 20, Section 1 be amended by adding a new subsection e. as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

e. The Evangelisch-Lutherische Kirche in Bayern (ELKB) (via the acceptance of *Sharing the Gifts of Communion [Augsburg Agreement]* of 2022)

<Proposed amended resolution text showing exact changes being made:>

e. *The Evangelisch-Lutherische Kirche in Bayern (ELKB) (via the acceptance of Sharing the Gifts of Communion [Augsburg Agreement] of 2022)*

EXPLANATION

An earlier version of this resolution was referred from the 80th General Convention. It was listed as 2022-B001 and referred to Legislative Committee 19 - Ecumenical & Interreligious Relations. It has been entered as resolution 2024-A009. The Standing Commission on Ecumenical and Interreligious Relations is proposing this amended version of the resolution.

THE EVANGELICAL LUTHERAN CHURCH OF BAVARIA

The discussions between the Evangelische-Lutherische Kirche in Bayern (ELKB) and The Episcopal Church (TEC) began as the result of a meeting in June 2013 between then Landesbischof Dr. Heinrich Bedford-Strohm and then Presiding Bishop the Most Rev. Dr. Katharine Jefferts-Schori. In their meeting, the two Presiding Bishops expressed the wish and challenge for the two churches to explore the possibility of closer communion, including, if possible, full communion with interchange of ministers and sharing of the sacraments.

A close relationship has existed for over 50 years between Episcopal Church and the ELKB in Munich, especially between the Church of the Ascension in Munich, a parish of the Convocation of Episcopal Churches in Europe, and the Emmauskirche, a parish of the ELKB. Ascension has shared space in the Emmauskirche since 1970. Elsewhere in Bavaria, a similar close TEC-ELKB relationship exists with the Episcopal missions in Nuremberg and Augsburg, who also share space with ELKB parishes.

Conversations between representatives of the ELKB and TEC began in 2013 shortly after the encounter between Presiding Bishops Jefferts-Schori and Bedford-Strohm, and soon took on the characteristics of a dialogue. Meetings in subsequent years took place in New York, Tutzing, Paris, and Augsburg. Numerous smaller meetings took place between in-person meetings.

The conversation/dialogue committee included representatives from TEC, the ELKB, and:

The Director for Unity, Faith, and Order of the **Anglican Communion Office**,

The Director of the Council for Christian Unity of the **Church of England**,

A representative of **Inter-Anglican Standing Commission for Unity, Faith, and Order**

The Church Executive of the **German National Committee of the Lutheran World Federation**,

The Evangelische Kirche in Deutschland (EKD) co-secretary of the **Meissen Commission**, and

CURRENT EPISCOPAL PARTICIPANTS IN THE TEC-ELKB CONVERSATION:

The Rt. Rev. Mark D.W. Edington (2019-present)

The Rev. Christopher Easthill (2019-present)

The Ven. Walter Baer (2017-present)

The Rev. Margaret Rose (2013-present) *TEC staff representative*

Kathryn L. Johnson, PhD (2013-present), Director for Ecumenical and Inter-Religious Relations (ELCA)

Resolution 2018-C059 ***approved and commended the process of exploring deeper relations and the dialogue toward full communion between TEC and the ELKB.***

Based on this **mandate**, between the 79th and 80th General Conventions, the dialogue committee developed a proposed agreement of full communion between TEC and the ELKB, found at the conclusion of this Blue Report. The agreement “Sharing the Gifts of Communion: An Agreement of Full Communion between the Evangelical Lutheran Church in Bavaria and The Episcopal Church (Augsburg Agreement)” was proposed to the 80th General Convention, in Resolution 2022-A091, for which 2022’s Legislative Committee 19 substituted Resolution 2022-B001. The Convention deferred consideration of Resolution 2022-B001 to the 81st General Convention.

Following upon this, the Standing Commission on Ecumenical and Interreligious Relations has engaged in continued study of the document, consultation with theological experts and concerned parties, particularly around questions of the historic episcopate, and commends the agreement document, which is included at the end of this report, to the 81st General Convention for implementation.

Support Documents:

["Sharing the Gifts of Communion \(Augsburg Agreement\)"](#)

[Commentary on "Sharing the Gifts of Communion \(the Augsburg Agreement\)"](#)

A038 Practical Guidance for Interreligious Relations

Resolved, That the 81st General Convention of The Episcopal Church adopt “Holding Difference Together: Episcopal Theological and Practical Guidelines for Interreligious Relations” as a resource for use by dioceses, parishes, and other Episcopal communities to develop and maintain interreligious relationships through conversation, collaboration, or other joint service or ministry initiatives with their neighbors of other faiths.

EXPLANATION

This document (attached as a supplemental document) reviews the history and theology behind The Episcopal Church’s participation in interreligious engagement. It offers practical guidance for people engaged in that work. It builds on *Theological Statement on Interreligious Relations* (2009) adopted by the 76th General Convention.

Support Document:

[Holding Difference Together: Episcopal Theological and Practical Guidelines for Interreligious Relations](#)

A039 Practical Guidance for Episcopal-Jewish Relations

Resolved, That the 81st General Convention of The Episcopal Church adopt “Christian-Jewish Relations: Theological and Practical Guidance for The Episcopal Church” as a resource for use by dioceses, parishes, and other Episcopal communities as they develop and maintain healthy and respectful relationships through conversation, collaboration, or other joint service or ministry initiatives with their Jewish neighbors.

EXPLANATION

This document (attached below as a supplemental document) updates a previous set of guidelines for Christian-Jewish relations, adopted by General Convention in 1988. It reviews the history and theology behind The Episcopal Church’s participation in Christian-Jewish relations and offers practical guidance for people engaged in that work.

Support Document:

[Christian-Jewish Relations: Theological and Practical Guidance for Episcopalians](#)

A040 Practical Guidance for Christian-Muslim Relations

Resolved, That the 81st General Convention of The Episcopal Church adopt “Christian-Muslim Relations: Theological and Practical Guidance for the Episcopal Church” as a resource for use by dioceses, parishes, and other Episcopal communities as they develop and maintain healthy and respectful relationships with their Muslim neighbors through conversation, collaboration, or other joint service or ministry initiatives.

EXPLANATION

This document (attached below as a supplemental document) reviews the history and theology behind The Episcopal Church’s participation in dialogue with Muslim communities. It offers practical guidance for people engaged in that work.

Support Document:

[Christian-Muslim Relations: Theological and Practical Guidance for Episcopalians](#)

A041 Create of a Task Force on The Episcopal Church-Anglican Communion Relationships

Resolved, That the 81st General Convention , pursuant to Joint Rule VII, create a task force on The Episcopal Church-Anglican Communion relationships, to work in collaboration with the Presiding Bishop, and whose mandate includes, but is not limited to, (1) conducting a study of issues impairing relationships of communion between The Episcopal Church and other Provinces of the Anglican Communion, and the development of proposals for engaging constructively across differences; (2) proposing systematic ways for the Episcopal Church to respond to theological statements issued by the instruments of the Communion; (3) proposing a means of establishing clear guidance for representatives of The Episcopal Church to the triennial meetings of the Anglican Consultative Council; and (4) supporting the work of the Offices of Ministry Beyond the Episcopal Church as it relates to relationships with our Anglican Communion partners; and be it further

Resolved, That the task force begin its work no later than January 1, 2025, with the task force concluding its work at the conclusion of the 82nd General Convention, unless its mandate is extended by the 82nd Convention; and be it further

Resolved, That the task force report annually to the Executive Council’s Joint Standing Committee on Ministry Beyond the Episcopal Church and a report with recommendations to the 82nd General Convention; and be it further

Resolved, That the membership of this task force be appointed by the Presiding Bishop and the President of the House of Deputies and include up to three Bishops appointed by the Presiding Bishop; up to three Clergy and up to three Lay Persons appointed by the President of the House of Deputies; up to two members of the Standing Commission on World Mission (SCWM) appointed by the SCWM; up to two members of the Standing Commission on Ecumenical and Interreligious Relations (SCEIR), appointed by the SCEIR; and up to four representatives with expertise in the history and polity of the Anglican Communion; and be it further

Resolved, That the Presiding Bishop appoint a member of staff from the Presiding Bishop's Office to serve as consultant to the task force; and be it further

Resolved, That \$30,000 be budgeted for the implementation of this resolution.

EXPLANATION

In the short time since the 80th General Convention concluded, significant developments have made clear the possibility of important changes in the relationships between Provinces of the Anglican Communion. Statements by leaders of some Anglican provinces that they no longer regard themselves as in communion with the Archbishop of Canterbury—a *sine qua non* of the bonds of Communion relationships—is one example.

The Episcopal Church should be a constructive voice in the conversations shaping the future of the Anglican Communion. Locating the responsibility for these issues within an Interim Body of the General Convention would be a clear signal to partner churches in the Communion of the seriousness with which our church will offer its voice in those conversations.

Joint resolution between the Standing Commission on World Mission and the Standing Commission on Ecumenical and Interreligious Relations

A042 Commend PCUSA-TEC Dialogue

Resolved, That this 81st General Convention receives with gratitude the revised “Episcopal-Presbyterian Agreement on Local Sharing of Ministries” which was prepared and distributed by the Episcopal Church-Presbyterian Church (U.S.A.) Dialogue; and be it further

Resolved, that this Convention gladly affirms the growing number of local ministries between the Episcopal Church and the Presbyterian Church (U.S.A.) that are enriching the Body of Christ, and be it further

Resolved, that this Convention authorizes the continuing bi-lateral dialogue between the Episcopal Church and the Presbyterian Church (U.S.A.) and be it further

Resolved, that this Convention encourages and strongly supports prayerful consideration by all Episcopalians over this coming triennium as we work towards closer relations with the Presbyterian Church (U.S.A.).

Support Document:

[Episcopal-Presbyterian Agreement on Local Sharing of Ministries](#)

A043 Amend Constitution Article VIII regarding Clergy in Local Ecumenical Partnerships

Resolved, That the 81st General Convention amend Article VIII of the Constitution by adding the following paragraph at the end of the existing article:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Of Clergy in Local Ecumenical Partnerships

An ordained minister in good standing of one of the constituent denominations serving in a formal Local Ecumenical Partnership may be appointed by the Ecclesiastical Authority of the Diocese in which the ministry is located to serve as an ordained minister of this Church within that specific ministry and as governed by the relevant canons.

<Proposed amended resolution text showing exact changes being made:>

Of Clergy in Local Ecumenical Partnerships

An ordained minister in good standing of one of the constituent denominations serving in a formal Local Ecumenical Partnership may be appointed by the Ecclesiastical Authority of the Diocese in which the ministry is located to serve as an ordained minister of this Church within that specific ministry and as governed by the relevant canons.

EXPLANATION

Many dioceses throughout the Episcopal Church already contain combined ministries with other Christian denominations. The Church of England calls these “Local Ecumenical Partnerships” and shares them with various Christian denominations. In the Episcopal Church’s context, this is increasingly becoming a missional reality in rural communities and college chaplaincies. The Constitutions and Canons of the Episcopal Church have no explicit provision for these combined ministries to operate with ordained leadership other than Episcopal ministers or those in formal full-communion agreements. The Standing Committee on Ecumenical and Interreligious Relations believes this constitutional change and a relevant canon (also submitted to the 81st General Convention) would make that provision and lay out the limited circumstances under which such partnerships could be formed. The canon also makes clear that this only applies to denominations whom the Episcopal Church has affirmed their “apostolicity, ordained ministers and sacraments” by act of general convention or membership in organizations chartered to do so and that ordained ministers of these denominations are credentialed only within the bounds of the ministry of the Limited Ecumenical Partnership.

A047 Amend Title I regarding Local Ecumenical Partnerships

Resolved, That the 81st General Convention amend Title I of the Canons by adding the following Canon 21.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon 21: Of Local Ecumenical Partnerships

Sec 1. Local Ecumenical Partnerships (LEPs) are ministries that may be formed between Episcopal dioceses and their parallels in other Christian denominations in order to provide shared pastoral leadership.

Sec. 2 LEPs may be formed with denominations:

- a. Who are in a full communion relationship with this church, or
- b. Whose apostolicity, ordained ministers and sacraments have been formally recognized by action of General Convention, or
- c. Who are member judicatories of Churches Uniting in Christ (CUIC) or its successor organization(s).

Sec. 3. LEPs may encompass congregations, chaplaincies, missions, or other ecclesial bodies.;

Sec. 4. LEPs are governed by formal, written agreements between the Ecclesiastical Authority of an Episcopal diocese and the equivalent authorities of other Christian Denominations as qualified in this canon. Such agreements should include provisions for, but are not limited to:

- a. The process for calling ordained leadership
- b. The terms of ordained leadership, including but not limited to:
 1. Method of paying compensation, insurance, and other benefits.
 2. Process for revocation of license and/or employment;
 3. Handling of Ecclesiastical Discipline
- c. The parameters of ecclesial function regarding worship, governance, sacraments, etc.
- d. A time frame and process for regular review of the agreement

Sec. 5. A LEP may be served by clergy ordained in and in good standing of any denomination who are part of the formal agreement and approved of by the Ecclesiastical Authority.

Sec. 6. Ordained ministers of denominations who are not in full communion with this church are authorized to exercise ministry only within the LEP, and do not retain any credentials within this Church after leaving its ministry.

<Proposed amended resolution text showing exact changes being made:>

Canon 21: Of Local Ecumenical Partnerships

Sec 1. *Local Ecumenical Partnerships (LEPs) are ministries that may be formed between Episcopal dioceses and their parallels in other Christian denominations in order to provide shared pastoral leadership.*

Sec. 2 *LEPs may be formed with denominations:*

- a. Who are in a full communion relationship with this church, or*
- b. Whose apostolicity, ordained ministers and sacraments have been formally recognized by action of General Convention, or*
- c. Who are member judicatories of Churches Uniting in Christ (CUIC) or its successor organization(s).*

Sec. 3. *LEPs may encompass congregations, chaplaincies, missions, or other ecclesial bodies.;*

Sec. 4. *LEPs are governed by formal, written agreements between the Ecclesiastical Authority of an Episcopal diocese and the equivalent authorities of other Christian Denominations as qualified in this canon. Such agreements should include provisions for, but are not limited to:*

- a. The process for calling ordained leadership*
- b. The terms of ordained leadership, including but not limited to:*
 - 1. Method of paying compensation, insurance, and other benefits.*
 - 2. Process for revocation of license and/or employment;*
 - 3. Handling of Ecclesiastical Discipline*
- c. The parameters of ecclesial function regarding worship, governance, sacraments, etc.*

d. A time frame and process for regular review of the agreement

Sec. 5. *A LEP may be served by clergy ordained in and in good standing of any denomination who are part of the formal agreement and approved of by the Ecclesiastical Authority.*

Sec. 6. *Ordained ministers of denominations who are not in full communion with this church are authorized to exercise ministry only within the LEP, and do not retain any credentials within this Church after leaving its ministry.*

EXPLANATION

Many dioceses throughout the Episcopal Church already contain combined ministries with other Christian denominations. The Church of England calls these “Local Ecumenical Partnerships” and shares them with various Christian denominations. In the Episcopal Church’s context, this is increasingly becoming a missional reality in rural communities and college chaplaincies. The Constitutions and Canons of the Episcopal Church have no explicit provision for these combined ministries to operate with ordained leadership other than Episcopal ministers or those in formal full-communion agreements. The Standing Committee on Ecumenical and Interreligious Relations believes this canon and a relevant change to Article VIII of the Constitution (also submitted to the 81st General Convention) would make that provision and lay out the limited circumstances under which such partnerships could be formed. The canon also makes clear that this only applies to denominations whom the Episcopal Church has affirmed their “apostolicity, ordained ministers and sacraments” by act of general convention or membership in organizations chartered to do so and that ordained ministers of these denominations are credentialed only within the bounds of the ministry of the Limited Ecumenical Partnership.

A048 Adoption of the Proposal for the Exchangeability of the Diaconate in The Episcopal Church and the Evangelical Lutheran Church in America

Resolved, That the 81st General Convention adopt the “Proposal for the Exchangeability of the Diaconate” in the Episcopal Church and the Evangelical Lutheran Church in America, which is attached.

EXPLANATION

The proposal has been endorsed by the Lutheran Episcopal Coordinating Committee and received by the Executive Councils of the Episcopal Church and the Evangelical Lutheran Church of America. It now comes to General Convention as part of its implementation.

Support Document:

[Proposal for Exchangeability of the Diaconate: The Episcopal Church and the Evangelical Lutheran Church in America](#)

A049 Affirming the Goal of Full Communion between The Episcopal Church and the United Methodist Church.

Resolved, that this 81st General Convention affirms previous resolutions 2018-A041, 2018-A261, and 2006-A055 for The Episcopal Church to continue dialogue with the United Methodist Church with the goal of reaching full communion; and be it further

Resolved, that as the United Methodist Church’s General Conference meets in 2024 after a four-year hiatus, this Convention joyfully anticipates advancing towards full communion with the United Methodist Church as outlined in The Episcopal Church-United Methodist Dialogue 2010 document, “[A Theological Foundation for Full Communion between The Episcopal Church and the United Methodist Church](#)” and then summarized in 2018’s “[A Gift to the World, Co-Laborers for the Healing of Brokenness](#)”; and be it further

Resolved, that this Convention encourages all Episcopalians to utilize the many resources available to understand the substance of the dialogue and its goal of full communion. Resources can be found on the websites of The Episcopal Church (<https://www.episcopalchurch.org/ministries/ecumenical-interreligious/united-methodist-episcopal-dialogue/>), the Episcopal Diocesan Ecumenical and Interreligious Officers (edeio.org), and umc-tec.org, a website supporting full communion between the United Methodist Church and The Episcopal Church; and be it further

Resolved, that this Convention encourages and supports prayerful consideration by all Episcopalians during the coming triennium of this significant step forward in response to our Lord’s fervent wish “that all may be one.”

EXPLANATION

Psalm 126: 5-6 (NRSVA): “May those who sow in tears reap with shouts of joy. Those who go out weeping, bearing the seed for sowing, shall come home with shouts of joy, carrying their sheaves.” 2024 marks 71 years of dialogue between Episcopalians and Methodists in the United States, the last 21 of which have been spent preparing for full communion between our two churches. The creation in 2006 of interim eucharistic sharing (described in Gift lines 19-21) resulted in the 2010 document setting out the theological foundations for full communion between the two churches (see summary in Gift lines 49-57). Both documents are attached for further reading. These carefully nurtured hopes recently experienced delays due to profoundly painful and unjust internal divisions within both our communities.

In 2024, however, new signs of hope for further ecumenical progress may be in view. As both supporting documents explain, the two churches are in harmony on the essentials of our faith. We share compatible views and practices on baptism, Eucharist, Scripture, ordained and lay ministry, mission, and the role of bishops. We believe our two churches will soon be poised to affirm full communion together as two branches of the same Jesus Movement tree, and to share in ministry by producing leaves fruitful for the healing of the nations (Rev. 22; quoted in Gift lines 12-15). As we prepare for that future, we commend the continued study and reception of the many gifts offered by the United Methodist Church that can enrich and sustain our life as The Episcopal Church.

Support Documents and Links:

[A Gift to the World, Co-Laborers for the Healing of Brokenness](#)

[A Theological Foundation for Full Communion between The Episcopal Church and The United Methodist Church](#)

[Supporting Full Communion between the United Methodist and Episcopal Churches](#)

[Episcopal Diocesan Ecumenical and Interreligious Officers](#)

[United Methodist Episcopal Dialogue](#)

Supplementary Materials

Document: [*Sharing the Gifts of Communion \(Augsburg Agreement\)*](#)

Document: [*Commentary on Sharing the Gifts of Communion*](#)

Document: [*Holding Difference Together Episcopal Theological and Practical Guidelines for Interreligious Relations*](#)

Document: [*Christian-Jewish Relations Theological and Practical Guidance for Episcopalians*](#)

Document: [*Christian-Muslim Relations: Theological and Practical Guidance for Episcopalians*](#)

Document: [*Report to the 2024 General Assembly: The Episcopal Church – Presbyterian Church \(U.S.A.\) Dialogue*](#)

Document: [*Proposal for Exchangeability of the Diaconate: The Episcopal Church and the Evangelical Lutheran Church in America*](#)

Document: [*A Gift to the World, Co-Laborers for the Healing of Brokenness*](#)

External Link: [*A Theological Foundation for Full Communion between The Episcopal Church and the United Methodist Church*](#)

1 *Proposal*

2 **Sharing the Gifts of Communion (Augsburg Agreement)**

3 **An Agreement of Full Communion between the Evangelical Lutheran Church**
4 **in Bavaria and The Episcopal Church.**

5

6 **Introduction**

7 1 Since the 1970s, a fruitful partnership has been built up in Bavaria between the
8 Convocation of Episcopal Churches in Europe, part of The Episcopal Church (TEC), and the
9 Evangelical Lutheran Church in Bavaria (Evangelisch-Lutherische Kirche in Bayern; ELKB),
10 which expresses itself in a consistent history of sharing in worship and prayer, and
11 working together in diaconal projects.

12

13 2 Through this work together, Episcopalians and Lutherans in Bavaria have come to
14 understand more deeply their shared mission and the bonds between their churches.
15 Building on existing agreements between Anglicans/Episcopalians and Lutherans in
16 Germany, North America and Northern Europe, TEC and the ELKB are now ready to move
17 into a relationship of full communion, enabling full interchangeability of ministries and
18 full participation in one another's mission.

19

20 3 This current agreement, made specifically between TEC and the ELKB, has been informed
21 by a number of previous agreements between Anglican and Lutheran churches:

22 • the *Meissen Agreement* (1991), between the Church of England and the
23 Evangelical Church in Germany (EKD), achieves mutual recognition of
24 churches and mutual Eucharistic hospitality, but does not achieve full
25 communion or interchangeability of ordained ministries;¹

26 and on the three regional agreements of (full) communion between Anglicans and
27 Lutherans:

28 • the *Porvoo Common Statement* (1992/93), between the European member
29 churches of the Anglican Communion and most of the Nordic and Baltic
30 Lutheran churches;²

31 • *Called to Common Mission* (1999/2000), between TEC and the Evangelical
32 Lutheran Church in America;³

¹ The ELKB is a party to the *Meissen Agreement* through the EKD

² Neither the ELKB nor TEC is a party to the *Porvoo Common Statement*. The signatories of the *Porvoo Common Statement* are, from the LWF: the Evangelical Lutheran Church of Denmark, the Estonian Evangelical Lutheran Church, the Evangelical Lutheran Church of Finland, the Lutheran Church in Great Britain, the Church of Iceland, Evangelical Lutheran Church of Latvia Abroad, the Evangelical Lutheran Church of Lithuania, the Church of Norway, the Church of Sweden; and from the Anglican Communion: the Church of England, the Church of Ireland, the Lusitanian Church of Portugal, the Scottish Episcopal Church, the Reformed Episcopal Church of Spain, and the Church in Wales. The Evangelical Lutheran Church of Latvia has observer status, which is intended to lead to membership. The United Evangelical Lutheran Church of Germany (VELKD), of which ELKB is a part, has the less binding guest status.

³ TEC is one of the signatory churches of *Called to Common Mission*.

- 33 • the *Waterloo Declaration* (2001), between the Anglican Church of
34 Canada and the Evangelical Lutheran Church in Canada.⁴

35 Through its membership in the Lutheran World Federation (LWF), the ELKB is in
36 communion with the Scandinavian and Nordic Lutheran churches, the Evangelical
37 Lutheran Church in America (ELCA) and the Evangelical Lutheran Church in Canada. TEC,
38 the Anglican Church of Canada, and the British and Irish Anglican churches are in
39 communion through their membership of the Anglican Communion. The LWF and the
40 Anglican Communion are also linked through the *Joint Declaration on the Doctrine of*
41 *Justification* (1999) agreed between the LWF and the Roman Catholic Church, the
42 substance of which was affirmed by the Anglican Communion in 2017.

43 4 In many parts of the world, member churches of the LWF and the Anglican Communion
44 work in close cooperation, with or without an agreement, and the Third Anglican
45 Lutheran International Commission urged churches to develop or adopt agreements that
46 reflect this cooperation.⁵ In this spirit, this agreement is offered as a further example and
47 invitation to other member churches of the Anglican Communion and the Lutheran
48 World Federation to consider in their contexts how such a move forward could be
49 accomplished.

50
51
52 5 Relationships between TEC and the ELKB have thus developed within the context of a
53 long history of ecumenical dialogue between Lutheran and Anglican/Episcopal churches,
54 which has shaped and enriched the experiences of many Anglicans and Lutherans. In
55 particular, through *Called to Common Mission*, mutual relationships between the ELCA
56 and TEC have become a lived reality. As distinctive churches with their own particular
57 relationships, in making this current agreement, TEC and the ELKB draw on the extensive
58 network of mutual experience of mission and ministry, as well as the experience of
59 working and worshipping together locally. The purpose of the current agreement is to
60 foster and deepen that common work through recognizing a relationship of full
61 communion between TEC and the ELKB.

62
63 6 TEC and the ELKB have already taken important steps towards full communion. The 1987
64 *Niagara Report* of the Anglican-Lutheran International Continuation Committee and
65 *Receiving One Another's Ordained Ministries* of the Inter-Anglican Standing Commission
66 on Unity, Faith and Order (received by ACC-16, 2016), define stages of relations between
67 churches. Relationships between the TEC and the ELKB have long-since reached stage 1
68 (recognition of one another as churches) and stage 2 (provisional structures exist which
69 promote mutual growth). The intention in this agreement is to move to stage 3, the
70 exploration of changing particular practices with respect to *episkopé* which will enable
71 the full interchangeability of ministries, and stage 4, the public declaration and
72 celebration of full communion.

73
74 7 In moving into this relationship, TEC and the ELKB understand full communion to be a
75 relation between distinct churches in which each recognizes the other as a catholic and
76 apostolic church holding the essentials of the Christian faith. Within this new relation,
77 churches become interdependent while remaining autonomous. Full communion

⁴ Neither the ELKB nor TEC is a party to the *Waterloo Declaration*, but the purpose of the *Memorandum of Mutual Recognition of Relations of Full Communion* is to link the *Waterloo Declaration* and *Called to Common Mission*.

⁵ *Jerusalem Report*, pp. 53.56 [Appendix 3].

- 78 includes the establishment of appropriate recognized organs of regular consultation and
79 communication, including episcopal collegiality, to express and strengthen the fellowship
80 and enable common witness, life, and service. Diversity is preserved, but this diversity
81 does not divide and is not static. Neither church seeks to remake the other in its own
82 image, but each is open to the gifts of the other as it seeks to be faithful to Christ and his
83 mission. They are together committed to a visible unity in the church’s mission to
84 proclaim the gospel and administer the sacraments.⁶
85
- 86 8 Specifically, TEC and the ELKB understand this to include welcoming one another’s
87 members to receive sacramental and other pastoral ministrations; mutual recognition
88 and interchangeability of ordained ministries; freedom to use one another’s liturgies;
89 mutual invitations to participate liturgically in one another’s ordinations and installations
90 of clergy, including bishops; and the development of suitable structures for consultation
91 to express, strengthen, and enable common life, witness, and service, to the glory of God
92 and the salvation of the world.⁷
93
- 94 9 Such a relationship is based on:
95 • a common confession of the apostolic faith in word and life;
96 • the sharing of one baptism, the celebration of one eucharist and the service of a
97 reconciled, common ministry;
98 • bonds of communion which support the churches at every level to guard and
99 interpret the apostolic faith, to teach authoritatively, to share resources, and to bear
100 effective witness in the world.⁸

101 **Signs of Communion that already exist**

- 102 10 Lutherans and Anglicans recognize that they already share communion in the Triune God
103 through their acceptance of the common gift of the Holy Scriptures; their affirmation of
104 the sacraments of baptism and the eucharist as constituent for the church; their shared
105 affirmation of the Apostles’ and Nicene creeds; their shared traditions of worship,
106 spirituality and theology; and their distinct but related experiences of the Reformation.
107
- 108 11 Anglicans and Lutherans both recognize Christ’s church as “the assembly of all believers
109 among whom the gospel is taught purely and the sacraments are rightly administered”.⁹
110 Anglicans and Lutherans hold the ordained ministry of Word and sacrament to be a gift
111 of God to the church, and recognize the necessity of structures of pastoral oversight and
112 authority.
113
- 114 12 Anglicans and Lutherans have never condemned one another as churches. TEC and the
115 ELKB now affirm that they recognize in one another the essentials of the one catholic and
116 apostolic faith, to which their statements of faith witness, including the *Augsburg*
117 *Confession*, *Luther’s Small Catechism*, and *TEC’s Book of Common Prayer (1979)*, and they
118 affirm the substance of the doctrinal consensus articulated by successive international
119 Anglican-Lutheran dialogues.

⁶ This paragraph adapted from *Called to Common Mission*, §2.

⁷ This paragraph is adapted from the *Waterloo Declaration*, §7, and the *Porvoo Common Statement*, §58(b).

⁸ These points are based on the headings of the *Meissen Agreement*, §8.

⁹ *Augsburg Confession*, art. 7, translation of the Latin text in Robert Kolb/Timothy Wengert, *The Book of Concord*, 43. Compare also the *Thirty-Nine Articles*, art. 19.

120

121 13 TEC and the ELKB affirm the cooperation between Episcopalians and Lutherans in
122 Bavaria, including the mutual invitation to receive communion, to share services and
123 joint diaconal work. In the absence of a formal agreement, the provisions of the Meissen
124 Agreement pertaining to ministry and worship have tacitly been taken to apply for TEC
125 and the ELKB in this local context.

126 **Ministry and oversight**

127 14 The key question for this ecumenical relationship has been that of the theology of
128 ordained ministry, and in particular that of episcopal ministry and its relation to
129 succession. This agreement welcomes the consensus reached on this question through
130 the *Porvoo Common Statement, Called to Common Mission*, and the *Waterloo*
131 *Declaration* and affirms the theological contribution made by those agreements in
132 moving towards a shared understanding. This agreement draws on those earlier
133 agreements, as well as on further reflection specific to the relationship between TEC and
134 the ELKB, to apply the consensus already reached to the specific situation in Bavaria, and
135 thus to the German context.

136

137 15 Together with the *Porvoo Common Statement*, TEC and the ELKB affirm that “the primary
138 manifestation of apostolic succession is to be found in the apostolic tradition of the
139 Church as a whole. The succession is an expression of the permanence and, therefore, of
140 the continuity of Christ’s own mission in which the Church participates.”¹⁰

141

142 16 Together with *Called to Common Mission*, TEC and the ELKB “acknowledge that one
143 another’s ordained ministries are and have been given by God to be instruments of God’s
144 grace in the service of God’s people, and possess not only the inward call of the Spirit,
145 but also Christ’s commission through his body, the church.” They agree that “ordained
146 ministers are called and set apart for the one ministry of Word and Sacrament, and that
147 they do not cease thereby to share in the priesthood of all believers”, and that these
148 ministers “fulfill their particular ministries within the community of the faithful and not
149 apart from it.” They recognize that “the priesthood of all believers affirms the need for
150 ordained ministry, while at the same time setting ministry in proper relationship to the
151 laity.”¹¹

152

153 17 Together with *Called to Common Mission*, TEC and the ELKB also affirm that “personal,
154 collegial, and communal oversight is embodied and exercised in both [...] churches in a
155 diversity of forms, in fidelity to the teaching and mission of the apostles.”¹² Together with
156 the LWF’s 2007 Statement *Episcopal Ministry within the Apostolicity of the Church*, TEC
157 and the ELKB affirm that in both churches, “Bishops are called to a special role of
158 oversight in the church, but the wider community also is called to participate in oversight
159 and to judge the way in which episcopal ministry is being carried out.”¹³ They
160 acknowledge also that in some other churches of the LWF, and also some other churches
161 of the EKD, those who exercise such “special role of oversight” are not referred to as
162 bishop, but rather, for instance, as Church President or *Präses*, similarly a Regional

¹⁰ *Porvoo Common Statement*, §39.

¹¹ *Called to Common Mission*, §7.

¹² *Called to Common Mission*, §7. The terminology “personal, collegial, and communal” is drawn from the discussion of ministry in *Baptism – Eucharist – Ministry* (WCC Faith and Order Paper 111; 1982), §26.

¹³ *Episcopal Ministry within the Apostolicity of the Church* (The Lund Statement), § 50.

163 Bishop may be known as *Landessuperintendent* or *Oberkirchenrat*.¹⁴ TEC and the ELKB
164 also recognize that this ministry of oversight – *episkopé* – is exercised not only through
165 bishops but also through the synods and other leadership structures of the two churches,
166 and that the relationship between bishops and these structures is an important aspect of
167 the ministry of oversight in both churches.¹⁵
168
169 18 Together with *Called to Common Mission*, TEC and the ELKB agree that the historic
170 episcopate “can be locally adapted and reformed in the service of the gospel.”¹⁶ Since
171 the
172 sixteenth century, the traditions from which both churches emerged have experienced
173 both continuity and change in their structures of *episkopé*. Different practices of
174 oversight developed in local contexts in response to diverse ecclesiological and political
175 realities and theological understandings. Anglicans maintained episcopal-diocesan
176 structures and continued to use the term “bishop” to describe these ministries after the
177 Reformation. Lutherans in Germany provided *episkopé* by adapting existing structures,
178 and described these ministries using a variety of terms, including “superintendent”, their
179 preferred translation of the New Testament term *episkopos*.
180 19 The establishment of Anglican parishes on the North American continent spread steadily
181 following the first recorded Anglican celebration of Holy Communion in North America in
182 1607 in Jamestown, Virginia. Prior to the American Revolution, representatives of the
183 Bishop of London known as commissaries provided oversight in some colonies. In the
184 context of American Independence from Great Britain, the first American bishops were
185 elected, and in 1789 The Episcopal Church was constituted as a separate ecclesiastical
186 jurisdiction and as a church independent of state authority. From this time TEC has
187 affirmed the importance of synodical government and bishops have been elected. The
188 structures established in 1789 continue to the present.
189
190 20 General Convention, made up of the House of Bishops and the House of Deputies (equal
191 numbers of elected clergy and lay people), sets the policy of the Episcopal Church. Its
192 bishops are democratically elected by their respective diocesan conventions or synods
193 and are answerable to the House of Bishops; they are to be servants of the church and
194 not its lords. The Presiding Bishop of the Episcopal Church is a member of the House of
195 Bishops, who since 1926 has been elected by that House, with confirmation by the House
196 of Deputies. A similar structure is mirrored in the dioceses, which have diocesan
197 conventions (made up of the diocesan clergy and elected lay delegates), that work
198 closely with the bishop. A bishop is elected at the diocesan convention by the clergy and
199 lay delegates, and is consecrated only after confirmation of this election by a majority of
200 TEC’s diocesan bishops and diocesan standing committees representing the whole
201 church. At the consecration, bishops are consecrated through prayer and laying on of
202 hands by at least three bishops, usually including bishops of the ELCA and other full
203 communion partners, with the involvement of representatives of the diocese, both
204 priests and lay persons, especially in presenting the bishop-elect for consecration, and in
205 the liturgy.
206

¹⁴ The *Lund Statement* summarizes these roles as “episcopal ministers”; to avoid confusion, this present statement refers to “ministers exercising episkopé”.

¹⁵ *Called to Common Mission*, §7.

¹⁶ *Called to Common Mission*, §24.

- 207 21 The Evangelical Lutheran Church in Bavaria was formed in 1808 after the foundation of
208 the Kingdom of Bavaria in 1806. The General Synod was established in 1848, initially
209 sharing responsibility with the ruling (Roman-Catholic) Bavarian monarch who acted as
210 *summus episcopus*, in direct continuity with the role of the late medieval German prince
211 bishops.¹⁷ After the fall of the Bavarian monarchy in 1918, the ELKB (*Landeskirche*) was
212 constituted, with a church president (*Kirchenpräsident*), who since 1933 has been
213 referred to as bishop (*Landesbischof*). The bishop works together with the Synod
214 (*Landessynode*, made up of two-thirds lay people and one third clergy) and its Executive
215 Committee (*Landessynodalausschuss*), and also chairs the Church Governing Board
216 (*Landeskirchenrat*), which is responsible for the day-to-day running of the church.
217 Oversight is exercised through these four church-governing bodies. The *Landessynode*
218 elects the *Landesbischof*. Regional bishops (*Regionalbischöfe*) or *Oberkirchenräte*, who
219 are members of the *Landeskirchenrat*, share the responsibility for oversight in their
220 episcopal areas or areas of responsibility through ordination and visitation.
221
- 222 22 Today, pastors of the Evangelical Lutheran Church in Bavaria are ordained by the
223 *Landesbischof* or regional bishops. Ordination is a onetime act. Central elements of the
224 liturgy are the prayer for the Holy Spirit, the laying on of hands and the blessing of the
225 ordinand. The ordination rite provides that assistants say a biblical word of blessing and
226 also lay on hands. These assistants are not restricted to the ordained, and may include
227 (for instance) members of the parish council (vestry) or the candidate’s family and
228 friends. The installation of a bishop is understood as the installation of an already
229 ordained pastor into a new office now with episcopal functions. The *Landesbischof* is
230 installed by the presiding bishop of the Evangelical Lutheran Church of Germany; the
231 regional bishops are installed by the *Landesbischof*. It is good practice – but not strictly
232 necessary – that at such installations bishops or ministers exercising *episkopé* in sister
233 churches within the Lutheran World Federation or other denominations are present and
234 assist in the laying on of hands.
235
- 236 23 In both TEC and the ELKB, these ministries of *episkopé* are therefore exercised personally,
237 collegially and communally.¹⁸ Bishops share the exercise of *episkopé* with the synodical
238 structures of the church. Ministers exercising *episkopé* constitute “a supra-
239 congregational form of ordained ministry for the sake of spiritual discernment and
240 leadership.”¹⁹ In both churches, clergy are ordained only by ministers who exercise
241 *episkopé*: the diocesan bishop or *Landesbischof*, suffragan or regional bishops.
242
- 243 24 Together with the LWF’s Lund Statement, *Episcopal Ministry within the Apostolicity of the*
244 *Church*, TEC and the ELKB affirm that these forms of *episkopé* are intended to preserve
245 the apostolic nature of the church and to interpret it for today. Through these structures
246 of *episkopé*, the church “exercises responsibility for its doctrine and practices through
247 open, critical deliberation and transparent ecclesial processes.”²⁰
248
- 249 25 TEC and the ELKB affirm also with the *Lund Statement* that a bishop does not exercise
250 his/her ministry in isolation: “together with teachers of theology, pastors in
251 congregations, persons called to a ministry of education and committed lay persons,

¹⁷ This concept of church government was known as the *Landesherrliches Kirchenregiment*.

¹⁸ See *Baptism – Eucharist – Ministry*, §26.

¹⁹ *Lund Statement*, §4.

²⁰ *Lund Statement*, §52.

252 episcopal ministers [i.e. ministers exercising *episkopé* – ed.] are especially called to judge
253 doctrine in the life of the church, and to reject teaching that is contradictory to the
254 gospel. The responsibility of governing bodies in the church (parish councils and church
255 synods) is also to take formal decisions to ensure that the institutional, practical life of
256 the church is in good keeping with the message of the gospel and witnesses to it.”²¹

257

258 26 In the words of the Anglican Bishops’ *Appeal to All Christian People* (1920), TEC and the
259 ELKB affirm that both churches have maintained and been served by an ordained
260 ministry truly faithful to the gospel, and that the ordained ministries of both churches
261 have always been, and continue to be, “manifestly blessed and owned by the Holy Spirit
262 as effective means of grace”.²²

263

264 27 The four articles of the Anglican *Chicago-Lambeth Quadrilateral* (1888) remain the
265 foundation for Anglican/Episcopal ecumenical relations. Anglicans and Lutherans have
266 long agreed on its first three articles which affirm the foundational nature of Holy
267 Scripture, the sacraments of baptism and the Eucharist, and the Apostles’ and Nicene
268 Creeds. The *Quadrilateral* sets out as the fourth basis for church unity: “the historic
269 episcopate, locally adapted in the methods of its administration to the varying needs of
270 the nations and peoples called of God into the unity of [God’s] Church.”²³ TEC and the
271 ELKB affirm that in both churches, *episkopé* is exercised in a form that is congruent with
272 this article.

273

274 28 With the *Meissen Agreement*, TEC and the ELKB “acknowledge that personal and collegial
275 oversight (*episkopé*) is embodied and exercised in [their] churches in a variety of forms,
276 episcopal and non-episcopal, as a visible sign of the Church’s unity and continuity in
277 apostolic life, mission and ministry.”²⁴ However, the ELKB and TEC can go further than
278 the *Meissen Agreement*: on the basis of the congruence in their understanding and
279 practice of *episkopé* and synodical government TEC and the ELKB are able to enter into a
280 relationship of full communion, with interchangeability of ordained ministries.

281

282 **Continuity in the Gospel: Historic and evangelical succession**

283 29 For both TEC and the ELKB, continuity in the proclamation of the gospel is of primary
284 importance in establishing the apostolic character of the Church. This is preserved
285 through “succession” However, the focus of the term “succession” is different in the
286 traditions of the two churches.

287

288 30 Within TEC succession is understood as the orderly succession of bishops ordained by
289 their predecessors as integral to the preservation of apostolic continuity in the
290 proclamation of the gospel. This represents an episcopal tradition which can be traced to
291 the ancient church, in which bishops already in this succession maintain the integrity of
292 the faith by ordaining newly elected bishops with prayer and the laying on of hands.²⁵
293 TEC, like all the churches of the Anglican Communion, asserts that its bishops stand in
294 historic succession understood in this way, through the consecration of new bishops

²¹ *Lund Statement*. §52.

²² Lambeth Conference 1920, Resolution 9.vii.

²³ Lambeth Conference 1888, Resolution 11.d.

²⁴ *Meissen Agreement* §VI 17 A.4.

²⁵ This definition is found in *Called to Common Mission*, §11.

- 295 through prayer and laying on of hands by at least three existing bishops. Acknowledging
296 this background, Anglicans have still recognized in their previous agreements of (full)
297 communion that the apostolic faith is preserved, not exclusively through the succession
298 of bishops, but by the whole church, that is, also through the ministry of priests and
299 deacons and of the whole people of God.
300
- 301 31 The ELKB understands succession in terms of the continuity of this apostolic faith, rooted
302 in the proclamation of the gospel and supported by the ordained ministry. As expressed
303 in the Augsburg Confession (art. 7), the Reformation emphasized the church as
304 evangelical, established through the continuous preaching of the gospel and the
305 celebration of the sacraments. This is the basis of the apostolic succession. The Augsburg
306 Confession (art. 14) teaches that “no one should publicly teach in the Church or
307 administer the Sacraments unless properly called.” Commenting on this, Article 14 of the
308 *Apology* (1531) affirms the Lutheran commitment to “willingly retain ecclesiastical and
309 canonical order”. Luther and other Reformers worked to ensure that structures were put
310 in place to maintain the true preaching of the gospel and celebration of the sacraments.
311 These structures have always included forms of oversight such as superintendents and
312 visitations. Through and since the Reformation, this continuity in local structures has
313 therefore been associated with a conscious conviction that apostolic teaching and faith
314 must be not only rediscovered but also preserved. Those involved in oversight are
315 installed through prayer and the laying on of hands.
316
- 317 32 Both TEC and the ELKB therefore recognize, as affirmed by *Called to Common Mission*,
318 that in the context of the ordained ministry and the ministry of the whole people of God
319 both churches “value and maintain a ministry of *episkopé* as one of the ways ... in which
320 the apostolic succession of the church is visibly expressed and personally symbolized in
321 fidelity to the gospel through the ages.”²⁶
322
- 323 33 In moving forward together, TEC and the ELKB commit to share an episcopal succession
324 that is both evangelical (true to the gospel) and historic (true to tradition), including
325 regularly a bishop of the other church to participate with at least two other ministers
326 exercising *episkopé* in the laying on of hands at the ordinations/installations of their own
327 bishops as a sign of the unity and apostolic continuity of the whole church.²⁷ TEC and the
328 ELKB believe that the fullness of the apostolic tradition preserved in each church will
329 deepen as a result of the relationship of full communion, through the shared ministry of
330 bishops and presbyters and of the whole people of God.
331
- 332 34 TEC and the ELKB share congruent understandings of *episkopé*, but this does not commit
333 the two churches to a unified concept of the office of bishop. TEC and the ELKB
334 acknowledge that there is a diversity of how the office of bishops is lived out in each
335 church. TEC and the ELKB affirm that the fact that the liturgy of introducing bishops into
336 office can be understood as installation or as ordination, or that tenure in office may
337 vary, or that the status of bishops when they leave office may differ does not hinder us
338 entering into full communion.
339

²⁶ *Called to Common Mission*, §12.

²⁷ *Called to Common Mission*, §12.

- 340 35 In order to demonstrate more clearly the shared nature of the *episkopé* exercised by
341 bishops, both churches commit to ensuring that at the ordination/installation of bishops,
342 the whole church be visibly present through the involvement of lay people as assistants
343 in the ordination/installation and to working to include in their installation/ordination
344 rites an affirmation that the bishop will exercise *episkopé* in conjunction with the
345 synodical government of the church.
- 346
- 347 36 Each church remains free to explore its particular interpretation of the ministry of
348 bishops in evangelical and historic succession. This should be done in consultation with
349 one another. Each church maintains and can enter into relationships with other
350 churches, including relationships of (full) communion, which do not oblige the other
351 church to engage in that relationship. That is, this declaration of full communion does not
352 imply automatic communion of the one church with the communion partners of the
353 other church, although each church is encouraged to seek communion with the churches
354 with which the other is in communion.
- 355
- 356 37 Recognizing one another as churches that truly preach the gospel and duly administer
357 the holy sacraments,²⁸ TEC and the ELKB receive with thanksgiving the gift of unity which
358 is already given in Christ. Christians have repeatedly echoed the scriptural confession
359 that the unity of the church is both Christ's own work and his call to all Christians. It is the
360 task of the churches, and of all Christians, as well as Christ's gift. Every Christian – and
361 every church – must “make every effort to maintain the unity of the Spirit in the bond of
362 peace” (Ephesians 4:3), praying that they may rely upon, and willingly receive from one
363 another, the gifts given by Christ through his Spirit “for building up the body of Christ” in
364 love (Ephesians 4:16).
- 365
- 366 38 As TEC and the ELKB, we do not know to what new, recovered, or continuing tasks of
367 mission this relationship of full communion will lead our churches, but we give thanks to
368 God for leading us to this point, and entrust ourselves to that leading in the future,
369 confident that our full communion will be a witness to the gift and goal already present
370 in Christ, “so that God may be all in all” (1 Corinthians 15:28).

371

372 **Actions and Commitments**

- 373 39 We, The Episcopal Church and the Evangelical Lutheran Church in Bavaria, declare
374 ourselves to be in full communion. Together,
375 a. We commit ourselves to continue and deepen our common life in mission and service,
376 to pray for and with one another and to share resources as appropriate in Bavaria,
377 recognizing that TEC is a very small minority there. We encourage regular collaboration 7
378 and consultation among members of our churches at all levels as appropriate.
379 b. We commit ourselves to offer sacramental and pastoral ministry to members of one
380 another's churches.
381 c. We commit ourselves to receive those who formally leave one church to move to the
382 other with the same status (for example baptized, communicant, confirmed) that they
383 held in their previous church.

²⁸ CA VII; 39 Articles Art. XIX.

- 384 40 The declaration of full communion between our two churches implies the immediate
385 recognition of currently serving bishops and pastors/priests of the one church by the
386 other. ²⁹ TEC fully recognizes the ordained ministry of bishops and pastors currently
387 existing within the ELKB, acknowledging its pastors as ordained ministers in the Church of
388 God and its bishops and regional bishops as bishops exercising a ministry of personal
389 *episkopé*. Likewise, the ELKB fully recognizes the ordained ministry of bishops and priests
390 currently existing within TEC, acknowledging its priests as ordained ministers in the
391 Church of God and its bishops as bishops exercising a ministry of personal *episkopé*.
- 392 41 With full communion, interchangeability of ministries is given. We therefore commit
393 ourselves to welcome persons ordained in either of our churches to the office of
394 priest/pastor to serve, by invitation and in accordance with any regulations which are in
395 force, in that ministry in the receiving church without re-ordination. We affirm that
396 bishops may be invited to carry out in the other church, as appropriate, those ministries
397 which they exercise in their own, such as confirmation.
- 398 42 We commit ourselves, as a sign of the unity and continuity of the Church, to invite
399 a. one another's bishops regularly to participate in the laying on of hands at the
400 installation/ordination of bishops, with the expectation that a bishop from the other
401 church will be present at the ordination of the bishop of the Convocation and the
402 installation of the *Landesbischof*;
403 b. one another's pastors and priests to participate in the laying on of hands at the
404 ordination of pastors or priests in one another's churches;
405 c. one another's lay people, including both those who share in the exercise of *episkopé*
406 and members of local congregations, to participate in our churches'
407 ordinations/installations in ways which celebrate the ministry of the whole people of
408 God.
409 Such mutual invitations are understood as a call for the deepening of the lived
410 experience of our communion.
- 411 43 We commit ourselves also to continue our practice of inviting representatives of other
412 churches, representing the worldwide church, to participate at the
413 installation/ordination of bishops.
- 414 44 We commit ourselves to ensure that at the ordination/installation of bishops, the whole
415 church be visibly present through the involvement of lay people as assistants in the
416 ordination/installation and to work to include in our installation/ordination rites an
417 affirmation that the bishop will exercise *episkopé* in conjunction with the synodical
418 government of the church.
- 419 45 We commit ourselves to invite a representative of TEC to attend the synod of the ELKB
420 and a representative of the ELKB to attend the Convention of the Convocation of the
421 Episcopal Churches in Europe, and to keep one another informed about developments in
422 our two churches.

²⁹ Deacons are not explicitly mentioned in this agreement. The *Jerusalem Report* of the Third Anglican Lutheran International Commission concluded that the church's expression of its diaconal character is context specific, so that different understandings of and practices with relation to the diaconate are to be expected and are therefore not communion dividing.

- 423 46 We commit ourselves to establishing a small continuation committee which for at least
424 seven years will undertake regular (at least annual) consultation regarding our
425 relationship, will initiate further work as needed, and can be consulted should any
426 questions or difficulties arise.
- 427 47 Each church agrees that the other church will continue its full communion relationship
428 with all the churches with whom it is already in communion. We encourage one another
429 to seek communion with these churches as well, but recognize that our declaration of full
430 communion does not imply automatic communion of the one church with the
431 communion partners of the other church.
- 432 48 We commit ourselves to work together to proclaim Christ’s gospel through word and
433 deed, and to further the unity of the whole of Christ’s church, recognizing that entering a
434 relationship of full communion will bring new opportunities and levels of shared
435 evangelism, witness, and service.

436

437

As of 22.02.2022

Commentary on “Sharing the Gifts of Communion” (the “Augsburg Agreement”)

An Explanatory Memorandum on the historical development of the ministry of episkopé in the Evangelical Lutheran Church in Bavaria

1. Introduction

- 1.1. Since 2013, following the initiative of the then-Presiding Bishop of the Episcopal Church, The Most Reverend Katharine Jefferts Schori, The Episcopal Church has been engaged in a dialogue with the Evangelisch-Lutherische Kirche in Bayern (the Evangelical Lutheran Church in Bavaria, or ELKB), with a view to exploring the possibility of a relationship of full communion between our churches.
- 1.2. This dialogue has explored theological, practical, and ministry aspects of our relationship as churches called to respond to God’s initiative in mission. It takes as its foundation the gift of our shared presence in the ancient land of Bavaria for more than a hundred years. The Episcopal Church is the only Anglican presence in Bavaria; all of our communities worship in spaces of the ELKB.
- 1.3. In our conversations together, the Episcopal delegation has given careful attention to a study of the history of Bavarian Lutheran Church, and its development into its present-day form. This post-Reformation history is more than twice as long as our own, and has witnessed the response of the church through a number of passages without parallel in our own story: the shattering of church unity during the Reformation; the confrontation with the Reformed tradition; the long trauma of the Thirty Years’ War, which claimed the lives of nearly a third of all people living in Western Europe, and nearly half in some parts of Germany; the dominance of state power over questions of church organization and practice; the catastrophe of National Socialism, and the painful division of Germany for forty-five years.
- 1.4. As Episcopalians and Anglicans, we begin in ecumenical dialogue understanding that “[h]istorically, Anglican ecclesiology has said interchangeability of ministries requires reconciliation of episcopal ministries.”¹ This means that the line dividing churches with whom we are in *relationship* from churches with which we are in *communion* ultimately devolves to the question of whether we recognize in another church the sign of the historic episcopate that we feel we have received as the gift of our own inheritance in faith. Our view on precisely what that sign signifies has changed over time, the fruit of both our deepening encounters with other churches and our own growing awareness of the contingent nature of our origins as a church

¹ Inter-Anglican Standing Commission on Faith, Unity, and Order, “Receiving One Another’s Ordained Ministries,” study document received by ACC-16, April 2016.

“Sharing the Gifts of Communion”: Commentary

that shaped its own “local adaptation” of the ministry of *episkopé* under conditions of exigency.

- 1.5. Having prayerfully reflected on the study of this history, the Episcopal delegation has come to the settled view that the Evangelical Lutheran Church in Bavaria is indeed characterized by the continuous presence of the historic episcopate throughout its history, locally adapted—as the fourth provision of the Lambeth Quadrilateral describes—“to the varying needs of the nations and peoples” who are the today the faithful people of the ELKB. Accordingly, affirming the conclusion of “Sharing the Gifts of Communion” that the Episcopal Church and the ELKB are churches in communion does not necessitate a suspension of the ordinal of this church.
- 1.6. To say this, however, is additionally to put forward an answer to a question of definition: What is the “historic episcopate”? What are the episcopal ministries that must be reconciled for the interchangeability of ministries to be not only possible, but in some sense required? If, in the words of the “Appeal to All Christian People” issued at the close of the 1920 Lambeth Conference, the episcopate is “one means” of providing “a ministry acknowledged by every part of the Church as possessing not only the inward call of the Spirit, but also the commission of Christ and the authority of the whole body,” then is the sign we seek that of the presence of the historic episcopate a sign of those qualities, or instead that of a particular form of their expression?
- 1.7. As we have studied together as Anglicans and Lutherans recent ecumenical agreements leading to the interchangeability of ministers, we note a shift away from a test grounded on specific forms of episcopal ministry and toward a focus on exactly these qualities in the expression of the ministry of *episkopé*—*apostolicity*, in the sense of proclamation and witness; *continuity*, as a lived awareness of the church’s obligation to obediently receive and faithfully transmit the teaching and witness of the church, and discern and form the vocation of a new generation of ordained ministers; *oversight*, or the assurance of order and ecclesial discipline in the church; and *ecumenicism*, the personification of the church’s catholicity and the expression of its longing for, and labors toward, the unity of all Christians in response to Christ’s own call.
- 1.8. Accordingly, we offer for the consideration of the wider Episcopal Church the view that the question of whether a reconciliation in episcopal ministries is possible—that is, whether the “sign of the historic episcopate,” the necessary condition of the interchangeability of ministries, is present—should be based on *an examination of the qualities intrinsic to that ministry*. Said differently, we feel we stand squarely on present Anglican ecumenical practice by saying that our work has sought to discern whether the sign of historic *episkopé*—as contrasted to the narrower construction of the “historic episcopate” as the succession of bishops—has been continuously present in another church. We are deeply persuaded that in the case of the ELKB, this is certainly true.

2. The historic expression of *episkopé* in the ELKB

- 2.1. While this brief memorandum cannot possibly encompass the long and complex history of the emergence of the ELKB from the crucible of both Reformation and religious war, it is vitally important for those considering this proposal of communion from an American perspective to bear in mind that while our story begins in separation from both the Church and crown of England, the Lutheran Church in Bavaria has contended throughout its history—a history longer than that of Anglicanism itself—with the complexities of entanglement with state power.
- 2.2. Even in late medieval and early modern Germany, long before the rupture of unity at the Reformation, the German aristocracy—a rising class of local and regional nobility beneath, but not entirely subservient to, the Holy Roman Emperor—held sway in the church. The emergence of this class was in a sense a consequence of the Investiture Controversy, the eleventh- and twelfth-century contest between the pope and the Holy Roman Emperor over who had power to appoint bishops and abbots. In feudal Germany, this newly emergent class of local nobility, whose status did not merely rest on being representatives and agents of the emperor, “entered wholeheartedly into an alliance with the Gregorian church....”² By 1500, the majority of German bishops were required to be members of this class, and German bishops were territorial princes as well as—and often effectively prior to—their spiritual responsibilities.
- 2.3. The parallel emergence of Luther’s Reformation and the first stirrings of the nation-state in Early Modern Europe are well known. The protection of Martin Luther by Frederick III, Elector of Saxony,³ personalizes what was in fact an important historical reality—the alignment of state power and church development. Luther felt—as did the earliest Anglicans—that he was correcting and continuing the Christian faith; “Luther never intended to found a new Church, rather he wished to restore the original Church, which had been perverted by the Roman papacy.”⁴
- 2.4. Yet Luther distinguished between the spiritual and secular aspects of that task, believing that the former could be entrusted to the unyielding power of the Gospel when correctly proclaimed, and the latter to those with the capacity to assure order in a time of instability and crisis. “In ecclesiastical affairs the princes or magistrates were not to act as secular rulers, but as the most eminent members of the congregation. In this [Luther] followed a conception that had been developed in the Middle Ages,

² Geoffrey Barraclough, *The Origins of Modern Germany* (Oxford: Basil Blackwell, 1979), 142.

³ An “elector” was one of the handful of princes given the right to vote in the election of the Holy Roman Emperor. Three of them were bishops—the Archbishops of Mainz, Trier, and Cologne; and four were lay princes (the King of Bohemia, the Count Palatine of the Rhine, the Duke of Saxony, and the Margrave of Brandenburg)

⁴ Hajo Holborn, *A History of Modern Germany: The Reformation* (New York: Alfred A. Knopf, 1967), 185.

namely that in the case of a breakdown of order in the Church the secular authorities had the right to act as temporary bishops for the restoration of normal conditions.”⁵

- 2.5. As a general observation, this points to a development in the history of the Lutheran Church in Bavaria and elsewhere in Germany that runs somewhat opposite of that in the history of Anglicanism. In the Anglican branch of the Reformation, the medieval bishops who had been in the pejorative phrase, “prince bishops” lost much of that political power, although they remained members of the English House of Lords. In Germany, by contrast, owing to the different circumstances in which Luther’s reform emerged, the reverse was true—the bishops who had been princes were replaced by princes who became bishops, at least to the extent of determining the way in which the Christian faith would be expressed in the lands they controlled, and (under the terms of the Peace of Westphalia) also guaranteeing that those of minority Christian beliefs had the right to worship as their conscience dictated.
- 2.6. In Bavaria’s case, this ultimately meant that all through the tumultuous process of Germany’s consolidation as a nation from dozens of separate principalities—through the 1806 dissolution of the Holy Roman Empire and the Revolutions of 1848, the unification of the German Empire in 1871, and the final collapse of the Bavarian monarchy as a consequence of Germany’s defeat in World War I—the sovereign of Bavaria held principal responsibility for assuring the tranquility of the church. Indeed, with the creation of the Bavarian Monarchy in 1805, the king of Bavaria—generally himself a Roman Catholic—also held the role of *summus episcopus* for the Lutheran churches there. This title was, over its long history, less a means of control than a responsibility of protection and facilitation; it had an organizational function (the Church Office of the Bavarian Lutheran Church was part of the Bavarian government), but it also expressed in a different way the constitutive quality of oversight by the episcopate, assuring that contending expressions of the Christian faith could coexist peacefully and worship without fear of reprisal or recrimination.
- 2.7. Throughout this long history, the doctrinal guidance and prophetic witness of the ELKB belonged not to the king but to its own leaders. If administrative oversight of the church was provided by a hybrid apparatus combining elements of church and state—the pastors were, after all, paid by the state, and the Peace of Westphalia established the principle that to the sovereign fell the duty of defending the free exercise of religion—the ecclesial oversight of the teaching of the faith, the conduct of ministries of service and witness, the raising up of new ministers, and the apostolic proclamation of the Gospel, were all the responsibility of the church itself, and of those who were, in ways appropriate to Bavaria’s culture and context, identified and lifted up as leaders in that church under a variety of titles.
- 2.8. That the Lutheran tradition resisted the specific title “bishop” (*bischof*) for this ministry has less to do with a rejection of the need for apostolicity, continuity, oversight, and

⁵ Holborn, A History of Modern Germany: The Reformation, 186-7.

ecumenism in the leadership of the church, and far more to do with a deep historic and cultural need to differentiate their church from the tradition Luther intended to both continue and reform. The conscious choice to render the scriptural witness ἐπίσκοπος in different ways—*Oberkonsistorialpräsident* (Senior President of the Consistory), *Kirchenpräsident* (Church President), or (since 1933) *Landesbischof* (Bishop of the Region [of Bavaria])—translated by our Bavarian colleagues in our joint work by the simple term “superintendent”—should not be read as in some way expressing a rejection of either the ministry or the sign of episkopé. Rather, in the local circumstances, language, and culture of the church it serves, these have been the ways in which the ELKB has named the continuing presence of the apostolic witness in their church.

- 2.9. It is also important for Episcopalians—who have never been, since our emergence as an autonomous province of the Anglican Communion, an established church with state entanglements—to note the history of movements within the Bavarian Lutheran Church, roughly paralleling the Oxford Movement in England, to sever all ties with state authority. The nineteenth-century “neo-Lutherans,” who emerged in the years following the revolutions of 1848, wrote to defend the deposit of Lutheran doctrine and standards against state-driven demands for church union (between Lutheran and Reformed traditions); to emphasize the normative authority of the witness of scripture; and to reassert the understanding of the church as a divine, not a civil, institution. As Walter Conser has observed, there were broad similarities between the neo-Lutherans and the Tractarians in their resistance to the incursion of state power on the church’s responsibilities and privileges. A leading thinker in this movement, Wilhelm Löhe, was a pastor and theologian of the Bavarian church. Importantly, this moment also revealed important differences between Anglicans and Lutherans on the source of the authority of episkopé in the church: “Where the Oxford movement had located authority in apostolic succession and then gone on to ground the church’s commission on that basis, the neo-Lutherans located this authority in the biblical word and founded the church on that base.”⁶
- 2.10. Can we see in this choice of a locus for the authority of the church’s teaching and witness a recognizable sign of historic episkopé in the ELKB? **The Episcopal delegation believes that the fruits of the continuous presence of this ministry in the ELKB could not be more plainly shown than through a consideration of its survival as an *intakte Kirche* (“intact church”) through the trauma of National Socialism and the years of World War II.** The *intakten Kirchen* were the few regional churches in Germany who did not capitulate, in the plebiscites forced on the German churches by the Nazi government on July 23, 1933, by electing into their leadership a majority of so-called *Deutschen Christen*, representatives of the Nazi-controlled “German Christian” faction. The ELKB did not. That did not mean, of course, that there were not Nazi supporters within the ELKB; yet even in the midst of the convulsions of

⁶ Walter H. Conser, Jr., “A Conservative Critique of Church and State: The Case of the Tractarians and Neo-Lutherans,” *Journal of Church and State* 25:2 (Spring 1983), 332.

the National Socialist years, the church was able to carry forth, under considerable duress, its continuing witness and ministry, and to do so without dividing, something the Episcopal Church, reflecting on the experience of Civil War, did not accomplish.

3. Consonance with other Anglican ecumenical initiatives

- 3.1. *Called to Common Mission*, our agreement of communion with the Evangelical Lutheran Church in America, is a singular ecumenical accomplishment of our part of the Anglican Communion. Since that time, of course, we have engaged in dialogue with other churches, notably the Moravian Church, leading toward agreements of full communion.
- 3.2. We have been aware, in our conversation, of the distinction made by canon in the Episcopal Church between *recognizing* and *reconciling* ordained ministries. We have been clear, as noted in 1.4 above, that the *sine qua non* of the higher standard of reconciled ministries is a reconciliation of the ministry of *episkopé*.
- 3.3. “Sharing the Gifts of Communion” makes clear that our two churches “share congruent understandings of *episkopé*,” and notes further that “this does not commit our two churches to a unified concept of the office of bishop” (§34).
- 3.4. In taking this view we are building on the work of other Anglican-Lutheran agreements beyond the Episcopal Church, especially the Porvoo Agreement which established relationships of full communion (and thereby interchangeability of presbyteral and episcopal ministers) between three of the four Anglican jurisdictions in Continental Europe (the Church of England, the Lusitanian Catholic Apostolic Evangelical Church, and the Reformed Episcopal Church of Spain), the other Anglican churches of the British Isles (the Church of Ireland, The Church in Wales, and the Scottish Episcopal Church), and the majority of number of national Lutheran churches in Northern Europe (Denmark, Estonia, Finland, Iceland, Lithuania, Norway, Sweden, and the Lutheran Church in Great Britain).
- 3.5. These churches approached their work acknowledging from the outset that “[t]he interruption of episcopal succession [in the Lutheran churches] has, nevertheless, always been accompanied by the intention and by measures to secure the apostolic continuity of the Church as a Church of the gospel served by an episcopal ministry” (Porvoo Agreement, §34). We believe this accurately and fully characterizes the witness and expression of *episkopé* in the ELKB as well.
- 3.6. The Porvoo Agreement further identifies the four entwined meanings of the sign of the laying on of hands in language equally pertinent to the Episcopal Church and the ELKB: “[F]irst it bears witness to the Church’s trust in God’s faithfulness to his people and in the promised presence of Christ with his Church, through the power of the Holy Spirit, to the end of time; secondly, it expresses the Church’s intention to be faithful to God’s initiative and gift, by living in the continuity of the apostolic faith and tradition;

thirdly, the participation of a group of bishops in the laying on of hands signifies their and their churches’ acceptance of the new bishop and so of the catholicity of the churches: fourthly, it transmits ministerial office and its authority in accordance with God’s will and institution. Thus in the act of consecration a bishop receives the sign of divine approval and a permanent commission to lead [their] particular church in the common faith and apostolic life of all the churches” (Porvoo Agreement, ¶48).

- 3.7. Accordingly, the Episcopal delegation to these conversations holds the view that the Evangelical Lutheran Church in Bavaria is no less characterized by the presence of the sign of the historic episcopate than its sister Lutheran churches in Northern Europe, many of whom, it should be noted, have a lower understanding than the ELKB of the distinct ministry of *episkopé* in the church. On this basis, we see our agreement as fully constant with established patterns of Anglican-Lutheran agreements of communion and ministerial interchangeability present in the context of Europe. We further believe that, on this basis, our agreement requires no departure from either the Constitution or the Canons of the Episcopal Church in order to provide a means of reconciling the ministries of bishop/*Bischof* and priest/*Pfarrer*, for those ordained to these ministries in the ELKB have received this ordination under the sign of the historic *episkopé*.

4. Practical Considerations

- 4.1. “Sharing the Gifts of Communion” provides for the establishment of a “Continuation Committee” (at ¶46) to contend with matters arising from the further implementation of this agreement. We believe that this is the correct place in which to locate responsibility for the design of a liturgical celebration of our agreement, guided by the simplicity of the provisions for the celebrations described in the Porvoo Agreement (at ¶59).
- 4.2. Because it is our view that the ELKB does indeed possess the sign of the historic episcopate, we do not feel the agreement itself to be the appropriate or necessary place to spell out liturgical provisions for how our agreement of communion will be inaugurated. Neither do we feel it appropriate to propose a liturgical action of Lutheran and Episcopal bishops engaging in a mutual laying on of hands, which would suggest that one is in need of receiving the historic episcopate from the other. Instead, following the model of Porvoo, we feel two services, one in Munich and one in Paris, at which the agreements were read and signed, prayers of thanksgiving for the past and the future offered by Lutherans for Anglicans and Anglicans for Lutherans, the exchange of peace, and a jointly celebrated Eucharist, together with other signs of our common life, will be appropriate.

5. The Question of Urgency

- 5.1. The conversations leading up to the final version of “Sharing the Gifts of Communion” have been ongoing for nearly ten years. The Episcopal delegation has reported, through the Committee on Interreligious and Ecumenical Work, to the 79th General Convention, and was commended in Resolution 2018-C059 to press forward in its work.
- 5.2. We realize that previous agreements of this nature have been received in full by one General Convention to be considered for a Triennium, and then considered for final approval at the subsequent General Convention. We feel, however, that such a practice places an undue burden on the proposed agreement, and that both Houses should take in view four considerations in weighing our resolution to affirm the Report’s finding that the Episcopal Church and the ELKB are churches in communion.
- 5.3. First, this agreement breaks no new ground in the domain of Anglican-Lutheran relationships. It relies on an understanding of “the historic episcopate, locally adapted in the methods of its administration to the varying needs of the nations and peoples called of God into the Unity of His Church” fully developed in the 1993 Porvoo Agreement.
- 5.4. Second, in “Sharing the Gifts of Communion” we are building incrementally on agreements already achieved and well-considered by the deliberative and legislative processes of our church. Indeed, in our ELKB partners we have found an expression of the Lutheran tradition with an understanding of the historic episcopate easily recognizable within the context of our previous agreements of full communion—in particular, that with the Church of Sweden, which will also be considered at this General Convention.
- 5.5. Third, seen from the perspective of the Episcopal Church in Europe, we are living at a moment of utmost danger to the interests of peace and security and the cause of human dignity. With war again unleashed in Europe, not in ninety years has there been a moment of greater urgency for Christian communities drawing nearer and working together to both proclaim and model God’s loving purposes. Our common witness and shared communion with the ELKB could not possibly come at a more pivotal time for the work Christians are called to do in this broken world.
- 5.6. Finally, in March of 2023 the ELKB will elect its new *Landesbischof*, the successor to Heinrich Bedford-Strohm, who with Presiding Bishop Jefferts-Schori inaugurated these conversations. The new *Landesbischof* will be installed the following November. A *Landesbischof* may serve in the ELKB for as many as twelve years; hence, the next bishop is not likely to be elected until 2035. The opportunity to participate in the new bishop’s installation next year would constitute both a crucial sign of our communion and a right beginning of our relationship, and one in which we hope General Convention will enable our church to participate.

THE
Episcopal
CHURCH



Holding Difference Together

Episcopal Theological and Practical Guidelines for Interreligious Relations

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Love God with all your heart, soul, mind, and strength; and, love your neighbors as yourselves.¹ Episcopalians take this twofold mandate with utmost seriousness. It informs our Baptismal Covenant promise to “strive for justice and peace among all people,” and to “respect the dignity of every human being.”² Because we have so promised, it is an act of Christian faithfulness to be in openhearted relationship with people whose religions differ from ours. Indeed, most Episcopalians live in the midst of religious diversity, in relationship with people who embrace lifeways different from theirs. As individuals, the range of attitudes Episcopalians hold about this reality is broad.

The Episcopal Church’s current teaching on interreligious relations encourages openheartedness. This requires serious self-examination with respect to our history. It commits us to genuine acts of repentance and lament in places where we have failed to behave towards our neighbors in ways that are consonant with the commandment to love them. Recognition that our interreligious encounters must now also be undertaken in the spirit of humility and repentance is foundational to the theology and practical guidelines set forth here. This set of guidelines seeks to clarify the distinctive aspects and implications of the attitude toward religious diversity projected by The Episcopal Church as a multicultural, multilingual, and multinational ecclesial body headquartered in the USA and present in at least fifteen other countries. Geographic and socio-political realities of The Episcopal Church cause challenges of interreligious encounter to vary significantly from place to place. In this time of reckoning and renaming, this document provides guidance for parishes and other Episcopal communities to develop and maintain interreligious relationships.

I. An Episcopal Theology of Interreligious Relations³

A. Foundations

Foundational to this document is the *Theological Statement on Interreligious Relations*—which has been, since its adoption by General Convention in 2009, the canonical rationale for The Episcopal Church’s interreligious work. Grounded in a theology of companionship, it provides a framework for such engagement by Episcopalians in our many locations. In turn, the 2009 statement rests on *Interfaith Relations and the Churches: A Policy Statement of the National Council of Churches of Christ in the U.S.A.* (1999), in the crafting of which The Episcopal Church played a vital role—and which was, in due course, embraced by General Convention. Deeply influential as well have been interreligious relations statements developed by the interfaith office of the Church of England, former Anglican Communion Network of Inter Faith Concerns (NIFCON, 1993–2017), and the Lambeth Conference of Bishops of the Anglican Communion.

B. Distinctive Aspects

The Episcopal Church’s approach to thinking theologically about interreligious concerns has nine distinctive aspects.

1. **Communio oppositorum** (a communion of opposites)

In its very essence as an expression of the Anglican tradition, a Christian *via media* (at once catholic and reformed), and a communion of opposites, The Episcopal Church brings to interreligious relations a unique charism: our commitment to hold difference together.

2. **Balance between scripture, reason, and tradition**

As Christians in the Anglican tradition, Episcopalians affirm that the Bible is the human record of God’s revelation, and that its authority is mediated by tradition and reason. This approach to scriptural interpretation is founded on the teaching of the sixteenth-century Anglican theologian Richard Hooker, as laid out in his *Of the Laws of Ecclesiastical Polity*. Hooker taught that Scripture reveals essential truths about God and ourselves that we cannot learn by any other means; and that God expects us to use our minds in order to reason together and thus discover the right way forward. This requires respect for the opinions of other people of goodwill. Following Hooker, The Episcopal Church seeks to be a community living in obedience to the Word of God revealed through Scripture, to which are brought insights derived from tradition and reason when reflecting theologically on interreligious matters. Because Episcopalians understand holy scripture to be at once inspired by God yet the work of human authors, editors, and compilers, we embrace the notion that the Bible contains all things necessary to salvation—but that not everything contained in the Bible *is* necessary to salvation. Episcopalians believe the Holy Spirit guides us in our continually growing understanding of the Scriptures. We also affirm the teaching of the Apostle Paul that God has spoken to the human race in other ways (Romans 1:20).

Christianity’s holy scriptures reveal to us both the invitation and the direction to engage with people of other religions. In Genesis 1:26 we meet the loving God who created all people and all nations. The awesome majesty of creation bids us to acknowledge with humility that the fullness of God’s intention is beyond the scope of our limited understanding; God’s gracious love is not confined to the Christian community alone. Because of our faith in the incarnation of God in Jesus Christ, we expect to meet God in our neighbor, whom God commands us to love as we love ourselves (Mark 12:29–31). Indeed, Jesus’ parable of the Good Samaritan makes clear that

our “neighbor” includes those of different religious commitments.

Our dynamic relationship with the Word of God and our experience of faith over time result in varying interpretations of scripture. The revelation of God in Christ calls us, therefore, to participate in our relationship with God and one another in a manner that is at once faithful, loving, lively, and reasonable. As Christians, we look to our own Scripture for insight about God. We also understand that wisdom can be found in the scriptures and teachings of other religions. We appreciate Mahatma Gandhi’s assertion that it is everyone’s duty “to read sympathetically the scriptures of the world. If we are to respect others’ religions as we would have them to respect our own, a friendly study of the world’s religions is a sacred duty.”⁴

3. The Baptismal Covenant as warrant for interreligious work

Episcopalians are heirs to the notion that praying shapes believing. The corollary is that what is said in liturgy should be observable in a worshipping community’s behavior beyond it.

Throughout the liturgical year, Episcopalians reaffirm the Baptismal Covenant, added to the Book of Common Prayer in the 1979 revision. Catechetical in form, it is an affirmation of belief in the core Christian doctrines enshrined in the Apostles’ Creed, plus hearty commitment to faith-in-action. Through the Baptismal Covenant, Episcopalians promise to strive for peace and justice, to respect the dignity of every human being, to seek and serve Christ in all persons, and to love their neighbor as themselves.

In recent decades, Episcopal Church interreligious documents have made direct mention of the Baptismal Covenant. By doing so, the Episcopal Church has taught repeatedly that the conduct of positive interfaith relations is an action stemming from core Episcopal-Christian identity. Neighbor-love, hospitality, and reminders of the command not to bear false witness against our neighbor (Ex. 20:16) have been consistently prominent themes.⁵ Witness, hospitality, and mutuality are Episcopal interreligious concerns, all of which arise directly from the theme of love of neighbor at the core of the Baptismal Covenant

4. Radically incarnational

Since the late twentieth century, Episcopal theologizing on interreligious relations has been radically incarnational. That is, it has been informed by the notion, found in earlier Christian thought, that, as Urban Holmes puts it, “even if humanity had never sinned, God [still] would have become flesh.”⁶ To be a church centered on an incarnational theology is to be a church radically open to the influence and ideas with which our faith comes into dialogue. It emphasizes that the Incarnation encompasses the entirety of human experience. It reminds us that Christ is the transformer, not the projection, of culture. This embodiment of the holy in the human continues in the church as the Body of the Risen Christ, called to be in the world as a self-emptying agent open to dialogue with others. As we Episcopalians strive to grow into the fullness of Christ, we endeavor to leave behind the Colonial Christ of our past. We embrace the Dialogical Christ who opens himself and gives himself for others, opening ourselves to conversation and collaboration with those whose religious commitments and convictions differ from ours.⁷

5. The doctrine of creation: humankind created in God’s image

Episcopal theological reflection on creation emphasizes God’s will for what *is*, more so than offering an explanation of how all things came to be. Hence the Episcopal Church’s Baptismal Covenant affirms that all human beings are made in God’s image and after God’s likeness. The

implication is that diversity—including religious diversity—has potential for good and that difference can be celebrated.

6. The role of the Holy Spirit

Themes of Creation bring us to pneumatology: study of God-the-Holy-Spirit. In this regard, Episcopal interreligious teachings remind us that the Holy Spirit, like the wind, “blows where it chooses” (John 3:8); others speak of God-on-the-move, or ponder “what God is up to” in the world.⁸ Such reminders that the activity of the Holy Spirit is unhampered by religious, cultural, and geopolitical boundaries encourage breadth in Episcopal interreligious friendship and collaboration.

7. Reconciliation and salvation

Our expectation that we shall discover new insights through interreligious relationships rests upon our embrace of Jesus as “the Way and the Truth and the Life,” coupled with our commitment to respect for the dignity of every human being. In mutual encounters and shared ascetic, devotional, ethical, and prophetic witness, we dare to hope that God will reveal new and enriching glimpses of a reconciled humanity, as well as new insights into how God works in the world through those who practice other traditions. The radically incarnational teaching of the Episcopal Church conveys our confidence that, in the coming of God in Christ, the transformation of all of creation has already been set in motion—and that God, who has been generous in creation, is no less generous in salvation. God’s gracious love is not limited to the Christian community.⁹

Episcopal interreligious theology makes broad use of the principle of reconciliation—the renewal of relationship with God accomplished for humanity in Jesus Christ; God’s gathering up of all things into a unity that honors difference. The language of salvation in and through Christ Jesus is fundamental to our understanding sin and how it may be overcome, particularly when we understand salvation as the process of reconciliation that allows difference to stand and to be honored.

However, salvation is a peculiarly Christian goal—a goal not necessarily sought by followers of other religions. Acknowledgment of differences among the ultimate goals of various spiritual paths opens up rich opportunities for learning and dialogue. In interreligious engagement, we learn from people who see the world’s problems through lenses other than “sin and salvation.” Wisdom offered by other traditions may enrich us as Christians, just as we may enrich others with our insights.

Responding to the attacks of September 11, 2001, in a sermon later that month to the House of Bishops, then-Presiding Bishop Frank Griswold declared: “God’s compassion, God’s mercy, God’s loving kindness, God’s fierce bonding love is the active principle that effects reconciliation: the gathering up of all things into a unity in which difference is both honored and reconciled in the fullness of God’s ever creative imagination.” Reconciliation grounds Episcopal understanding of salvation and eschatology (the study of the ultimate destiny of humankind).¹⁰

Eschatologically, we live in the “already but not yet.” Our efforts at reconciliation can be seen as attempts to make real in the here-and-now, the future perfection God has accomplished already through Christ. Episcopalians dare to hope that God is drawing all of creation back to Godself through Christ. Therefore, the Church’s teaching on interreligious relations encourages Episcopalians to offer their gifts for the carrying out of God’s ongoing work of reconciliation toward our mutual flourishing.

8. Trinitarian monotheism

The Episcopal Church’s approach to interreligious relations is unabashedly Trinitarian. We insist that the one and only God is Triune. The very life of God is one of mutuality, interdependence, and reciprocity—a divine dance of intimacy in which unity does not require uniformity. The implication for interreligious relations is this: we manifest the reality of having been made in the image and after the likeness of the Triune God by striving for right-ordered relationship with all of creation—and that includes people whose religious convictions and commitments are different from ours.

Trinitarian imagery may not be most helpful when in direct conversation with someone of another religion; nevertheless Trinitarian theology offers abundant resources for understanding religious diversity as a good that is integral to creation, rather than as cause for concern and division. Diversity is eternal—since the very essence of God-as-Triune encompasses irreducible difference. In Christian understanding, all of humanity is made in the image and likeness of God; therefore, in its irreducible diversity, humanity as a whole models the Trinity.¹¹

As the great Buddhist teacher-activist Thich Nhat Hanh often said, “we inter-are.”¹² The theological principle of participation requires that we strive “to live in deep, right-ordered relationship with God and all of creation.”¹³ And, it bears repeating, “all of creation” includes our neighbors whose religious convictions and communities differ from ours. Friendship and collaboration are possible in and through (rather than in spite of) irreducible religious differences.

9. Our commitment to an ecumenical approach

The Episcopal Church is committed to an ecumenical approach to interreligious-relations work. We are a founding member of the National Council of Churches of Christ in the USA and a member of the World Council of Churches. We draw upon the thinking of scholars from many streams of Christianity in crafting our own interreligious statements. The Episcopal Church’s radically incarnational and Trinitarian interreligious relations theology emphasizes mutuality, interdependence, and reciprocity—which, in turn, has implications for love of neighbor, for embassy, and for hospitality. It is to our theology in action that we now turn.

II. Practical Interreligious Relations Guidelines for Episcopalians

A. Knowing our History

When undertaking interreligious work at any level (church-wide, diocesan, or parish; global, national, or local), and whatever our geographical context, it is useful to understand The Episcopal Church’s history, both negative and positive, with respect to the peoples, groups, religious traditions, or worldviews with which we wish to engage.

1. Episcopal involvement in global and national interreligious work

The Episcopal Church’s administrative structure has long included an office dedicated to interreligious work. In addition, interfaith efforts may be initiated by the Presiding Bishop as primate and chief pastor of the church or may be handled by a special committee—most recently, the subcommittees of the Standing Commission on Ecumenical and Interreligious Relations. Engagement in interreligious work through external structures is, as noted above, a hallmark of The Episcopal Church’s approach.

- Episcopalians were participants in the first World Parliament of Religions in 1893, and in every convening since the Parliament’s revival in 1993.

- The Episcopal Church was well-represented at the 1910 Edinburgh Missionary Conference—which is credited with birthing the modern ecumenical movement.
- Since the inception of the National Council of Churches of Christ in 1950, The Episcopal Church has provided robust support for that body’s interfaith office.
- The Episcopal Church collaborates with the World Council of Churches in its ongoing interfaith efforts.
- The Episcopal Church is a founding member of *Shoulder to Shoulder*, a coalition-based campaign that strives to end discrimination and violence against Muslims in the United States.
- The Episcopal Church is also an active member of Religions for Peace-USA.

Therefore, The Episcopal Church encourages collaborative and ecumenical work on interreligious matters at the local and diocesan levels. It is worth noting that the United Religions Initiative (URI) was founded by an Episcopal bishop.

2. Previous influential statements on interreligious engagement

In considering further how best to engage with religious difference in the present, Episcopalians do well to recall groundbreaking resources developed in past decades and still of usefulness today. These include *Nostra Aetate* (In Our Time), issued by the Second Vatican Council in 1965, which helped to inaugurate a new era of interreligious engagement; and The Episcopal Church’s *Theological Statement on Interreligious Relations* (2009). Also worthy of ongoing study are the 1988 Lambeth Conference document *Christ and People of Other Faiths*, which teaches that interreligious dialogue is coherent with discipleship and mission; its Appendix, entitled *Jews, Christians, and Muslims: The Way of Dialogue*—the first Anglican Communion interfaith document to provide guidance for positive relations with Muslims; *Generous Love: the Truth of the Gospel and the Call to Dialogue—an Anglican theology of inter faith relations*, a sophisticated and useful treatise issued by the Anglican Communion Network of Inter Faith Concerns in 2008; and the *Lambeth Call on Inter Faith* (May 2023).¹⁴

3. Episcopal engagement with Judaism and Jewish people

It is important for Christians in the Anglican tradition to acknowledge participation in the centuries-long persecution of the Jewish people through forced conversion to Christianity, the preaching of contempt for them, and the interpretation of many Bible passages in ways that lead to the demonization of Judaism and the denigration of it as a living religion. Since the middle of the twentieth century, The Episcopal Church has demonstrated its repentance of that behavior through actions by General Convention promoting dialogue with Jewish people. In 1988, General Convention issued *Guidelines for Christian-Jewish Relations for Use in The Episcopal Church*, thus officially endorsing a course of action for thinking theologically and behaving ethically. Subsequently, many Episcopalians have reframed their preaching and teaching to emphasize their recognition that contemporary Judaism is a living religion that took shape after the destruction of the Jerusalem Temple in the year 70 CE, and that has grown and thrived during the centuries since. *Christian-Jewish Relations: Theological and Practical Guidance for The Episcopal Church* (2023) is the most recent teaching on this topic.

Even though, since the end of World War II, Episcopal relationships with our Jewish neighbors have improved significantly, issues arising out of language in our Book of Common

Prayer still linger, particularly in some of the liturgies of Holy Week and Good Friday. Sensitivity to those issues is required of all who preach and teach the scriptural texts of Holy Week or who use them as part of Christian formation.

Lingerer also is the question of how The Episcopal Church may best maintain its longstanding commitment to and support of the modern state of Israel, while also supporting the rights of Palestinians to their own state. The ongoing Israeli occupation of Palestinian territories continues to present significant social justice issues for Episcopalians who support the Palestinian cause. The Church continues to navigate this contentious issue with a deep commitment to the collaborative and mutually enriching relationships that we have built with Jewish people over many decades. However, neither Episcopalians nor Jewish people are of one mind with respect to the Israeli/Palestinian conflict. Therefore, any interreligious encounter that engages it requires diplomacy and care.

4. Episcopal engagement with Islam and Muslims

The Episcopal Church recognizes that, through the centuries, relations between Muslims and Anglican Christians have been complex and often contentious.¹⁵ For guidance in respectful engagement with Muslims, The Episcopal Church has drawn on *Jews, Christians and Muslims: The Way of Dialogue* (1988), the first interreligious relations treatise from the Lambeth Conference of Bishops of the Anglican Communion to engage Islam robustly and openheartedly. With this document as a foundation, the General Convention of The Episcopal Church passed resolutions in 1997 and 2003 that formalized a commitment to dialogue with Muslims founded on affirmation of human rights and religious freedom for all people.¹⁶

In 2007, when 138 distinguished Muslim scholars issued “A Common Word Between Us and You,” a landmark open letter to Christian religious leaders around the world, Rowan Williams, then Archbishop of Canterbury, responded to it on behalf of the Anglican Communion, respectfully and positively, with “A Common Word for the Common Good.” The Episcopal Church was asked to participate in the crafting of that response. It did so by submitting “Renewing Our Pledge” (2008), a didactic document that was also made available to all dioceses. Finally, The Episcopal Church has produced *Christian-Muslim Relations: Theological and Practical Guidance for The Episcopal Church* (2021, revised 2023)—a document paralleling its guidelines for relations with Jewish people.

5. Episcopal engagement with Indigenous traditions

The Episcopal Church acknowledges that religious diversity includes the practices, beliefs, rituals, and spiritual wisdom of Indigenous peoples. We acknowledge the long-overdue need to address fully and honestly, in all countries in which The Episcopal Church resides, the history of our church’s interaction with Indigenous peoples in the many places where Anglican Christians conducted missionary work. During the eighteenth and nineteenth centuries in North America particularly, as a consequence of missionary efforts, Christians in the Anglican tradition took part in the denigration of Indigenous Americans’ religious and cultural traditions including support for laws that made the practice of such traditions illegal. The Episcopal Church participated in the removal of Native American children to boarding schools that often abused them physically, prohibited them from speaking their native languages, forbade their engagement in their indigenous spiritual practices, and forced them to convert to Christianity. A statement in 2021, by the Presiding Bishop and the President of the House of Deputies acknowledges that history, mourns “the intergenerational trauma that cascades from it,” and

calls for “recognition of wrongdoing, genuine lamentation, authentic apology, true repentance, amendment of life and nurture of right relationships.”¹⁷

The Doctrine of Discovery—the theological notion informing The Episcopal Church’s relationship with Indigenous peoples during the eighteenth, nineteenth, and twentieth centuries—was disavowed in 2009 by means of a General Convention resolution.¹⁸ The way had been paved for such a move when, in 1997, General Convention initiated a Decade of Remembrance, Recognition and Reconciliation with Indigenous Peoples—a process of repentance on the part of the church that was renewed in 2007 and 2017, with the intent to do so every ten years. The launch of this initiative was accompanied by concerted attempts to reconcile with Indigenous peoples with regard to the serious harm done to them by Christians.¹⁹ Disavowal of the Doctrine of Discovery was reasserted in 2012 by General Convention, which also directed dioceses and parishes to study and reflect on the impact of that doctrine in their own locations.

The Episcopal Church now endeavors to interact with Indigenous peoples in a manner that respects the integrity of their religious practices and recognizes that some choose to maintain those practices simultaneously with our Episcopal tradition. We also strive to be sensitive to tensions that sometimes exist between Indigenous persons who have adopted the Christian religion and those who have not.

In this time of racial reckoning, it is crucial for Episcopalians to be aware of the racist and colonial history of our church’s dealings with people who are not White and not Christian. Only when our efforts are based upon a genuine desire to engage our interlocutors as teachers and partners whose wisdom and experience will ultimately benefit all of us, will our interreligious efforts further our quest to create Beloved Community.

B. Contextualizing Interreligious Work

Given its institutional presence in at least sixteen countries, the contexts in which The Episcopal Church is found—thus the potential for positive interreligious engagement—vary greatly. Today’s technology enables us to see the earth from space as an orb on which borders and boundaries are fluid, easily fractured, and unstable. The trials of climate change and global pandemic heighten our awareness that the peoples of the earth will either survive together or perish together. At the same time, our entire world is housed inside the flat screens of computers that provide immediate access to almost anyone or anything at anytime, anywhere on the planet. Crises and conflicts that were once local matters and seemed to be none of our concern are now global. Social strife, political upheaval, and violence fueled predominantly by greed or religious fanaticism are never distant from us. Yet, since The Episcopal Church is headquartered in the United States, what happens socio-politically in that context has church-wide implications. Here are three examples.

1. Improving understanding of Islam and Muslims

The impact of the September 2001 attacks on the USA was immediate and profound; its consequences were multinational and interreligious; its influence on interreligious relations is ongoing in all provinces of The Episcopal Church. In its immediate wake, Episcopal efforts to learn more about Islam and Christian-Muslim relations were many: dialogical initiatives, diocesan and parish workshops, seminary course-offerings. During the more than two decades since, political actions exacerbating anti-Muslim bigotry generally have been hurtful to Episcopalians’ Muslim dialogue partners. Churchwide, the need for education about Islam and opportunities for dialogue with Muslims persists.

2. Dismantling Racism

The COVID-19 global pandemic of 2020–2021 underscored our common humanity to an extent rarely seen in the past, victimizing every race, creed, nationality, religion, and socio-economic level, taking a disproportionate toll on people of color and the poor. Meanwhile, in the United States, a series of highly-publicized killings of African Americans at the hands of law enforcement provoked large protests and civil unrest. It also stimulated fresh determination to expose and combat systemic racism within The Episcopal Church itself and to work toward racial justice interreligiously. As a result, The Episcopal Church’s longstanding work of dismantling racism was reaffirmed and reenergized

The process of repentance for the complicity of The Episcopal Church in American society’s systemic racism is long and complex—as is the work towards creating a church free of racism. Indeed, The Episcopal Church’s work on positive interreligious relations will fall short unless the intersection between interreligious understanding and racism is acknowledged. Commitment to eradicating racism within The Episcopal Church and in our larger society includes acknowledging the Church’s role in promoting racism. For example, many Africans and African Americans were hurt by our church’s participation in White supremacist thinking that supported the institution of slavery itself (which included the forcible baptism of some people as part of their enslavement). Additionally, the Church was complicit in the Japanese internment camps in World War II.

In the United States today, as we engage in interreligious encounter with people of the Hindu, Buddhist, Muslim, Sikh, Jain, Confucian, Afro-Atlantic, and American Indigenous traditions (and many others), we also recognize that the racial discrimination encountered in American culture is intricately entwined with the toxic racial bigotry that our church was complicit in establishing during the eras of slavery and Jim Crow. Structures of White supremacy and White privilege have kept African Americans and other people identified as non-White from enjoying abundance of life. They also impact the lives and experiences of many immigrant communities, both those that are Christian and those of other religious or spiritual traditions. Engagement with immigrant religious communities and interfaith groups in the USA today must be undertaken with the recognition that The Episcopal Church has been part of a system that discriminates against these communities not only because of their religious difference from the American Christian majority, but also because of the legacy of racism, in the form of anti-Blackness. It is not enough merely to engage in interreligious dialogue or encounter with these communities. Episcopalians must also be poised to work with them to overcome the racial bias to which they are subjected.

3. White supremacy and Christian Nationalism

On January 6, 2021, with the COVID-19 pandemic still raging, the United States Capitol building was stormed by armed insurrectionists in an attempt to overrule the outcome of a free and fair presidential election. Some insurrectionists carried crosses; others carried flags bearing the words “Jesus 2020.” Some wore t-shirts and hoodies emblazoned with anti-Jewish slogans. In short, the action was a display of Christian Nationalism: a potent combination of political rhetoric and behavior, racism, anti-Jewish bigotry, and a distorted version of Christian theology based largely upon the foundation of White supremacy.

While, through public rhetoric and other gestures, the insurrectionists made clear their belief that their actions were condoned by God and were necessary in order to reclaim the United States as a “Christian” country, Presiding Bishop Michael Curry firmly repudiated them by

endorsing a statement put forth by the organization *Christians Against Christian Nationalism*, of which The Episcopal Church is a member, saying:

As followers of Jesus, his command to love our neighbors means neighbors of every type, of every faith, not just our own. Through our baptism and in our democracy, we are called to a way of love that creates a community in which the dignity of every human being is recognized and respected, and where all can have an equal say in the governing of our civic life. The violence, intimidation and distortion of scripture associated with “Christian nationalism” does not reflect the person and teachings of Jesus Christ, and so I stand with fellow leaders in the Christian community and call for a better way.²⁰

Given Episcopalians’ frequently renewed Baptismal Covenant promise to “seek and serve Christ in all persons,” a “better way” begins with recognizing that bigotry is fed by systemic discrimination in which religion and race are tightly interwoven.

In September 2020, the House of Bishops Theology Committee issued *White Supremacy, Beloved Community and Learning to Listen*—a statement that makes clear the extent to which Anglo-Saxon forebears instantiated White supremacy and a posture of anti-Blackness in American culture. The work of improving interreligious understanding in the twenty-first century goes hand-in-hand with our efforts toward repudiating White supremacy and overcoming racism—including the stanching of anti-Asian, anti-Latino/Latina, and anti-Indigenous behavior. In recognizing the dignity of all people in our interreligious work, we are demonstrating yet another way to speak against racism, while also building relationships spanning both religious and racial lines.

C. Continuing the Effort Toward Mutual Flourishing

Wherever in the world The Episcopal Church is present, four issues—ongoing anti-Jewish bigotry, anti-Muslim bigotry, systemic racism, and unjust treatment of indigenous peoples—inform and complicate interreligious work. Each country in which The Episcopal Church is institutionally present is home to occurrences and issues that are in urgent need of extra scrutiny. It is imperative that Episcopalians in every province name the unique ways those issues manifest in their contexts; acknowledge other factors that may be even more germane in a particular locale; and learn and tell their own stories of interreligious understanding, collaboration, and resilience.

The Baptismal Covenant promise to strive for justice and peace among all people issues to Episcopalians a warrant for the work of cultivating positive interreligious relations as part of the larger mission of creating Beloved Community wherever in the world we find ourselves. Interreligious friendships enable us to learn about and from our neighbors, to make common cause with them for the greater good, and—by experiencing practices beyond our own Christian tradition—to develop a more vibrant understanding of God. Therefore, Episcopalians are encouraged to engage in interreligious relationship-building, information-sharing, community-service, advocacy, and celebration—activities that nurture and sustain mutual understanding, respect, and trust. When adherents of disparate religions stand together in solidarity, they bear witness collectively to the dignity of every human being. Presence becomes a courageous mode of peacemaking in a violent world. The promise to strive for justice requires Episcopalians to support ecumenical and interreligious initiatives that encourage encounter, dialogue, advocacy, and community service. All are imperative for resolving tensions whose root causes may be social, environmental, economic, or political, but to which religious difference may be an exacerbating factor.

D. Building Beloved Community

For interreligious problem-solving or cultivation of deeper understanding, The Episcopal Church commends *dialogue*—a potentially transformative, formal, structured, conversation, the method for which is dialectical, reciprocal, empathetic, and courteous. Interreligious dialogue fosters the mutuality so necessary for making common cause with regard to peace, social justice, and religious liberty.

When dioceses, congregations, and other organizations of The Episcopal Church—on their own, in partnership with other Christian Churches, or in consultation with other provinces of the Communion— enter into dialogue with people of other religious traditions, they do best when mindful of advice given by the great scholar Krister Stendahl. He taught that, in seeking to understand another religious tradition:

- Take questions about it to its adherents, not to its detractors;
- Compare the best of our own tradition’s beliefs and practices and behavior of its adherents to the *best* of another’s; resist the urge to compare the best in our tradition to the worst in the other’s;
- Leave room for “holy envy”—the possibility of being captivated by some aspect of a tradition not our own, thus delighting in its beauty or wisdom.²¹

Whatever our context, Episcopalians are likely to have neighbors whose backgrounds, beliefs, and practices differ from ours and from whom much can be learned. Opportunities abound for developing creative relationships with people who embrace other religions, yet are searching, as are Episcopalians, for justice, peace and sustainability. The Episcopal Church’s theological and ecclesial heritage offers resources for participating in this interreligious quest. Interreligious companionship and collaboration is integral to God’s mission. Episcopalians prepare for it by fulfilling the Baptismal Covenant promise to “continue in the apostles’ teaching and fellowship, in the breaking of bread, and in the prayers.”

¹ See Mark 12:29–31; Book of Common Prayer (1979): Catechism, 851.

² Book of Common Prayer (1979), 305.

³ This section draws upon portions of Lucinda Allen Mosher, *Toward Our Mutual Flourishing: The Episcopal Church, Interreligious Relations, and Theologies of Religious Manyness* (New York: Peter Lang, 2012).

⁴ M. K. Gandhi, “Crime of Reading the Bible: 2nd September 1926” in *Young India 1924–1926* by Mahatma Gandhi (Madras: S. Ganesan, 1927), 1172–74 at 1173.

⁵ “Neighbor-love” is foundational to several Episcopal Church interreligious relations documents. *Guidelines for Christian-Jewish Relations* (1988) addresses hatred and persecution of Jews. In *Principles for Interfaith Dialogue* (1994), neighbor-love informs the directive to “approach others with the same kind of respect we would wish to be accorded.” It is developed even more in *Renewing Our Pledge* (2008), which responds to a Muslim call for dialogue, and also in the *Theological Statement on Interreligious Relations* (2009). For analyses of these documents, see Mosher, *Toward Our Mutual Flourishing*. 48–55, 19–22, 79–84, 97–107; for full texts of each document, see Appendix therein.

The relation between the command not to bear false witness and interreligious matters is prominent in The Episcopal Church’s efforts to address anti-Judaism. It is latent in the fact that, in the statements most directly related to Islam and Muslims, we find no hint of the anti-Muslim rhetoric so prominent in certain streams of US and European culture during the first decades of the twenty-first century. See the *Preface to Guidelines for Christian-Jewish Relations* (1988) and *Renewing Our Pledge* (2008)—the response of the Episcopal Church to the Muslim initiative *A Common Word*.

⁶ Urban T. Holmes, *What Is Anglicanism?* (Wilton, Connecticut: Morehouse-Barlow, 1982), 28.

⁷ See Paul Knitter, “What about Them? Christians and Non-Christians,” in *Essentials of Christian Theology*, ed. William C. Placher (Louisville, KY: Westminster John Knox Press, 2003), 317.

⁸ See particularly, the NCCC policy statement *Interfaith Relations and the Churches* (1999), and the Episcopal Church’s mission vision statement *Companions in Transformation* (2003).
http://www.tituspresler.com/global_mission/companions/CompanionsInTransformation-Text.pdf

⁹ See the *Theological Statement* (2009), the *NCCC Policy Statement* (1999), and *On Waging Reconciliation* (2001). For analyses of these documents, see Mosher, *Toward Our Mutual Flourishing*, 97–106, 30–37, and 73–79, respectively; see also integrative analysis on p.125 therein.

¹⁰ Reconciliation is a notion foundational to the *Guidelines for Christian-Jewish Relations* (1988). The *NCCC Policy Statement* (1999), which is affirmed by The Episcopal Church, devotes paragraphs 31–35 to it, asserting: “Through Jesus Christ, Christians believe God offers reconciliation to all.”

¹¹ See Marjorie Hewitt Suchocki, *Divinity & Diversity: A Christian Affirmation of Religious Pluralism* (Nashville: Abingdon Press, 2003), 69. See also Dwight J. Zscheile, *People of the Way: Renewing Episcopal Identity* (New York: Morehouse, 2012), 46.

¹² Thich Nhat Hanh, *Being Peace* (Berkeley, California: Parallax Press, 1987), 87.

¹³ Dwight J. Zscheile, “Beyond Benevolence: Toward a Reframing of Mission in the Episcopal Church,” *Journal of Anglican Studies* 8, no. 1 (2009): 100.

¹⁴ The year 2008 also saw the release of two other significant interreligious relations documents: “A Common Word for the Common Good”—the official reply of Rowan Williams, Archbishop of Canterbury, to “A Common Word Between Us and You,” a pan-Muslim call for dialogue with Christians promulgated in October 2007; and “Relations with Other World Religions” (Section F of the 2008 Lambeth Conference Indaba Reflections).

¹⁵ See Hugh Goddard, *A History of Christian-Muslim Relations*, second edition (Edinburgh: Edinburgh University Press, 2020); Nabil Matar, *Islam in Britain 1558–1685* (Cambridge: Cambridge University Press, 1998); Nabil Matar, *Turks, Moors, & Englishmen in the Age of Discovery* (New York: Columbia University Press, 1999).

¹⁶ General Convention, *Journal of the General Convention of ...the Episcopal Church, Philadelphia, 1997* (New York: General Convention, 1998), p. 769; General Convention, *Journal of the General Convention of ...The Episcopal Church, Minneapolis, 2003* (New York: General Convention, 2004), p. 477f.

¹⁷ Statement on Indigenous boarding schools by Presiding Bishop Michael Curry and President of the House of Deputies, Gay Clark Jennings (July 12, 2021),

¹⁸ General Convention, *Journal of the General Convention of...The Episcopal Church, Anaheim, 2009* (New York: General Convention, 2009), 371–72.

¹⁹ General Convention, *Journal of the General Convention of ...The Episcopal Church, Philadelphia, 1997*, (New York: General Convention), 87.

²⁰ For full text, see www.christiansagainstchristiannationalism.org.

²¹ For an account of the origins of Krister Stendahl’s three rules, see Barbara Brown Taylor, *Holy Envy: Finding God in the Faith of Others* (New York: HarperOne, 2019), 64–66.

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Christian-Jewish Relations Theological and Practical Guidance for Episcopalians

Episcopalians commit to a posture of respect when dealing with other faith communities. How that respect manifests itself will differ not only from tradition to tradition, but within the breadth of those traditions as well. This document provides succinct guidelines for constructive dialogue with Jewish neighbors.¹ Judaism is a vibrant and complex community with many voices, some quite discordant with each other. It is an understatement to note that the Christian tradition (itself also quite complex and discordant) has not always respected the Jewish people as fellow children of God. This set of guidelines is for Episcopalians seeking a basis for building common ground, especially in joint service and ministry, with Jewish people—a resource for Episcopal teaching, preaching, daily scripture-study, individual prayer, corporate worship, and lament for past mistakes.

1. **Openheartedness.** First, without question, openheartedness toward Judaism and the Jewish people accords with the faith we proclaim through The Episcopal Church's Baptismal Covenant.
2. **Obligation.** The Baptismal Covenant promise to strive for justice and peace among all people obliges Episcopalians to treat Judaism and the Jewish people justly.
3. **Acknowledgement.** Because persistent unjust stereotyping of Jews by Christians continues to harm Jewish people in the present day (as it has for centuries), it is imperative to acknowledge that anti-Judaism is expressed in a wide array of present practices of The Episcopal Church: liturgical texts, interpretation of scriptures, preaching, devotional practices, poetry, iconography, hymnody, academic writing, pastoral advice, and educational resources.
4. **Truthful witness.** Given the scriptural mandate to witness truthfully, Episcopalians are obliged, in teaching, preaching, and informal communication, to present biblical and Rabbinic Judaism accurately. We can begin by presenting Jesus as an observant first-century Jew striving to fulfill the Law and the Prophets. Even while affirming that, as we see it, in Christ Jesus God has done a new thing, we can make explicit the substantial theological and scriptural continuities between Judaism and Christianity. We can be mindful of implicit or explicit references to Jews or Judaism in liturgy, in the public reading of Scripture, in hymnody, and in artistic representations that can reinforce prejudices.

5. **Better practices.** It is imperative that Episcopalians strive for practices that note, discontinue, and resist new iterations of stereotyping of Jewish people so they will be treated justly. Here are six recommendations.
- a. **Be mindful of vocabulary.** In our efforts to combat behavior harmful to our Jewish neighbors, it is useful to rethink how harmful behavior is named. To label the problem accurately, we can use “anti-Jewish bigotry” or “antisemitism” (unhyphenated).²
 - b. **Stress God’s continuing covenant.** A strong theology accounting for God’s continuing covenant with the Church and the Jewish people alike is the best corrective for unjust portrayal of historical and contemporary Jewish people in Episcopal liturgy, preaching, and teaching.
 - c. **Eschew supersessionism.** A pernicious theological move often called “theological supersessionism” is the root of anti-Judaism (be it overt or unintentional) sometimes expressed in Christian life and thought. Supersessionist theology feeds the stereotyping of Jewish people by making three erroneous assertions: that Judaism is obsolete; that, because of their role in the passion and death of Jesus of Nazareth, God has ended the covenant with the Jewish people; that the Church has replaced the Jewish people in unique relationship with God. The anti-Judaism and supersessionism latent in Episcopal Passion Sunday and Holy Week liturgies raise many concerns. For help in understanding the issues and considering solutions, see essays by Louis Weil, Ruth Meyers, and Susan Auchincloss archived on the website of the Standing Commission on Liturgy and Music of the Episcopal Church (2012–2015 triennium).³
 - d. **Avoid teaching of contempt.** Closely linked to supersessionism, the practice known as *teaching of contempt* involves manipulation of Christian doctrine and scripture to denigrate Jewish people and Judaism in a variety of ways: interpretation of passages of the New Testament particularly in John’s gospel to blame Jews for the crucifixion of Jesus; preaching salvation by grace using language in the Pauline epistles that maligns “the Law” and suggests that those who practice their religion through adherence to “the Law” as revealed to the Jewish people at Sinai are somehow misguided or ignorant; suggesting that the Jewish people have missed the mark because they do not believe Jesus to be the Messiah. By means of such logic, Christians have justified and perpetuated Jewish suffering. Not only does such teaching foster negativity, distrust, and hostility toward Jewish people, it has often led to violence. The Baptismal Covenant promise to strive for justice requires Episcopalians to recognize that, given persistent stereotyping and persecution, manifested during its most extreme form in the genocide of the Jews during the Shoah, Jewish people are justifiably fearful.⁴ Because we have so promised, we are obliged to eschew the teaching of contempt.
 - e. **Mitigate latent anti-Judaism.** Latent anti-Judaism in our hymnody can be mitigated by making use of revisions that preserve the theological depth and purpose of particular hymns while excising supersessionist themes. The Rev. Dr. Barbara K. Lundblad’s reworking of the hymn *O come, O come, Emmanuel* is an excellent example.⁵
 - f. **Appreciate; don’t appropriate.** Judaism, a living and continually developing religion with its own integrity, has many beautiful traditions. Episcopalians may be deeply appreciative; yet they should resist any inclination to transpose Jewish ritual and tradition into Christian liturgical contexts. “Christian Seders” offer a case in point. Although

Jesus's last supper may have been a Passover meal of some sort, it assuredly was not a Seder in the modern sense, since the Passover Seder was introduced into Jewish ritual life in late antiquity, after the destruction of the Temple in Jerusalem. Attempts by Christians, even if well intended, to make this ritual their own are insensitive. However, when a Jewish person issues an invitation to a Seder, it is entirely appropriate for a Christian to accept that hospitality.

6. **Respect our shared scripture.** We do well to remember that Jesus himself drew upon the collection of writings that are canonical for Judaism to this day. These writings comprise more than half of the Christian Bible—an acknowledgment of common affirmation by Christians and Jews of God as revealed through patriarchs and prophets.
 - a. Just as second-century Christians resisted moves to set these writings aside, so too should we refrain from marginalizing them. It is helpful for Christians to be aware of the Jewish practice of reading the Torah in conversation with the Talmud (a multi-volume collection of Torah commentary, law, and more). Although Christian and Jewish people read them differently, these shared sacred writings provide a common resource for prayer, study, preaching, and dialogue.⁶
 - b. While Episcopal use of the term “Hebrew Bible” may seem to be a gesture of neutrality and inclusivity, it is not without its problems. All Jewish writings now included in the Christian Bible were received by the earliest Christian communities in Greek translation. For Episcopalians, “Scripture” includes several Jewish works that were composed in Greek. Furthermore, Jews and Christians organize their shared sacred writings differently. Therefore, consider context. When referring to this collection as Christian Scripture, call it “Old Testament;” when referring to it as Jewish Scripture explicitly, call it “Tanakh;” when speaking of it as a collection held in common by Christians and Jews, call it “Old Testament/Tanakh.”⁷
 - c. When studying the Bible, Episcopalians can guard against unintentional anti-Judaism by making good use of resources such as *The Jewish Annotated New Testament* edited by Amy-Jill Levine and Marc Zvi Brettler, or Marilyn Salmon’s *Preaching Without Contempt*.⁸
7. **Embrace theological dialogue.** When thinking theologically, Episcopalians characteristically draw simultaneously upon scripture, tradition, and reason. Christian-Jewish dialogue can enhance this practice, as can listening carefully to a range of Jewish voices.
 - a. It is worth remembering that in “Jewishness” is great variation: the religion “Judaism” has several movements (somewhat analogous to Christian denominations), each with its distinguishing beliefs and practices; some see themselves as members of “the Jewish people,” but have little interest in traditional beliefs or practices; and among those who identify as Jewish, can be found people of every race.
 - b. The Jewish tradition of “midrash,” through which the rabbis and sages of the tradition have wrestled with the Torah and continuously re-interpret it for new contexts and eras, offers a way for Christians and Jewish people to engage in fruitful dialogue—each drawing upon their unique interpretive traditions to discover new ways of understanding

the world through their respective religious lenses. Jewish midrash and Christian contextual theology can find fascinating places of convergence and divergence.

8. **Israeli/Palestinian Conflict:** Attitudes toward the contemporary nation of Israel and responses to its actions are complicated by questions regarding the status of the Palestinian residents within its borders and in territories it occupies. These issues are complex and demand caution, mindful of our Baptismal Covenant promise to strive for justice and peace. The Episcopal Church's Office of Global Relations has worked on these matters for many decades, thus has resources for use by dioceses and parishes.⁹
 - a. Dialogue between Episcopalians and Jews about the Israeli/Palestinian conflict is difficult but important. Participants must educate themselves about this ongoing conflict and recognize that it presents issues that divide Christians and Jews intra-religiously as well as interreligiously.
 - b. When framing critiques of policies of the nation-state of Israel, it is imperative to avoid tropes and stereotypes that have long been a part of Christian anti-Judaism. For example, statements that conflate the Jewish people worldwide with the nation state of Israel or blame all Jews for the actions of the state of Israel; depictions of the State of Israel, either in words or visual images that draw on old stereotypes of Jews as demonic, or greedy, or as controlling the world; making assumptions about any given Jewish person's attitudes or beliefs about the state of Israel or how that person's Jewish identity is or is not aligned with support for the state of Israel.
9. **Make common cause:** The kinship between Judaism and Christianity is distinct; our shared sacred texts are the source of common beliefs and values. The Jewish ethic of *tikkun olam* (repair of the world) and The Episcopal Church's own statements on ecology and creating Beloved Community provide foundations by which Episcopalians and Jewish people can participate collaboratively in God's mission: mitigating human need, challenging structural injustice, and caring for creation.¹⁰ By affirming this, Episcopalians bear witness to God's abundant grace and acknowledge that they may indeed work together with Jewish people in loving service to God and to humanity.

¹ This document—which is informed by the Church of England Faith and Order Commission's *God's Unfailing Word: Theological and Practical Perspectives in Christian-Jewish Relations* (2019) and is a thorough revision of a set of a document memorialized by the Eightieth General Convention (2022)—updates *Guidelines for Christian-Jewish Relations for Use in the Episcopal Church* adopted by the Sixty-Ninth General Convention in 1988. A companion document offers guidance for Episcopal-Muslim relations.

² For an explanation of what is at stake, see "Spelling of antisemitism" by the International Holocaust Remembrance Alliance: <https://www.holocaustremembrance.com/antisemitism/spelling-antisemitism>.

³ See <https://standingcommissiononliturgyandmusic.org/>.

⁴ See *Facing History & Ourselves*, Lesson 6: "The roots and impact of antisemitism," <https://www.facinghistory.org/resource-library/teaching-holocaust-and-human-behavior/roots-and-impact-antisemitism>.

⁵ For Barbara Lundblad's version of the hymn, see <https://maryshaima.wordpress.com/2016/12/03/veni-immanuel/>.

⁶ Of particular value is Marilyn Salmon, *Preaching without Contempt* (Minneapolis: Fortress Press, 2006).

⁷ See "Christian and Jewish Bibles" in Amy-Jill Levine and Marc Zvi Brettler, *The Bible With and Without Jesus*:

How Jews and Christians Read the Same Stories Differently (New York:HarperOne, 2020), 7–13.

⁸ Amy-Jill Levine and Marc Zvi Brettler, eds., *The Jewish Annotated New Testament: New Revised Standard Version Bible Translation* (New York: Oxford University Press, 2011); also, other works by Amy-Jill Levine. See Marilyn Salmon, *Preaching without Contempt*, mentioned in note 6. See also, Sarah Dylan Breuer, *dylan's lectionary blog*: Fifth Sunday in Lent, year C at <https://www.sarahlaughed.net>. Also, Thomas E. Breidenthal, "Neighbor-Christology: Reconstructing Christianity before Supersessionism," in *Cross Currents* (Fall 1999): 320–48. Also, Rosemary Radford Reuther, *Faith and Fratricide: The Theological Roots of Anti-Semitism* (Eugene, Oregon: Wipf and Stock, 1996).

⁹ See The Episcopal Church's Global Partnerships website: <https://www.episcopalchurch.org/ministries/global-partnerships/>.

¹⁰ See The Episcopal Church's *Covenant for the Care of Creation*, available at <https://www.episcopalchurch.org/ministries/creation-care/>

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Christian-Muslim Relations: Theological and Practical Guidance for Episcopalians

Since 1979, General Convention has passed resolutions endorsing substantive dialogue between Episcopalians and Muslims on theological and humanitarian matters. During this same period, The Episcopal Church has encouraged and supported Christian-Muslim dialogues facilitated by the National and World Councils of Churches. Increasingly, Episcopalians are engaging with Muslims at the local level in a variety of settings. This guide provides theologically grounded tips and best practices for those new to such engagements.

1. **The authenticity of openheartedness.** These guidelines rest on the conviction that openheartedness toward (thus positive relationship with) Islam and Muslims accords with our Baptismal Covenant promise to seek and serve Christ in all persons and to strive for justice and peace among all people.
2. **The matter of names.** “Islam” is itself the Arabic word for “submission.” It is pronounced with the accent on the second syllable. Things mandated, influenced, or inspired by Islam may be termed “Islamic.” An adherent of this religion is a Muslim. (The term “Mohammedan”—while found in some literature—is not an appropriate synonym.) When used as an adjective, “Muslim” indicates something done by (or having to do with) a person who embraces “Islam”—the religion. In some publications, “Muslim” is rendered “Moslem.” In fact, a survey of English-language materials about Islam will reveal that many terms have more than one spelling. Why such variants? Arabic, the sacred language of Islam, uses an alphabet consisting of consonants only. Some have no direct equivalent in the Latin alphabet. The process of conversion of words from Arabic script to Latin letters allows for multiple spelling possibilities.
3. **Islam’s complexity.** Worldwide, one in every five persons identifies as Muslim. Consider, therefore, the following points:
 - a. “The Muslim World” is an oft used but seldom helpful construct. When used by non-Muslims, it implies a place/a group of people “out there” or “over there”—whereas, in almost every diocese of The Episcopal Church, Muslims have been a significant presence

for two generations or more. The binary “the Muslim World versus the West” is rarely accurate. Speaking of “Muslim-majority” countries or regions is often more appropriate.

- b. Through immigration and commerce, Muslims, in all their diversity, have introduced Islam to every locale in which The Episcopal Church is present.
 - c. Muslims, like Christians, are not monolithic in their attitudes, experiences, and priorities. Diversity among Muslims results from factors such as nationality, ethnicity, native language, geographic location, social status, gender, economic status, attitudes toward modernity, sectarian lines, preferred legal tradition, and attitudes toward global politics, among other factors. Broad generalizations about Islam and Muslims are, therefore, likely to be inaccurate.
 - d. While there are many commonalities, there are important distinctions between Sunni and Shi’a Islam. The two differ regarding Islam’s early history and the transfer of authority after the death of the Prophet, certain theological matters, certain worship practices, and the foundations of jurisprudence. Demographically, some 85% of all Muslims are Sunni. Some 10% are Shi’a. Some simply say, “We are Muslims,” and decline sectarian labels. Regarding African American Muslims, most are Sunni, a few are Shi’a, and some belong to movements such as the Nation of Islam.
4. **Basics.** Given the complexity of Islam, essentializing is to be avoided; but Episcopalians engaged in interreligious dialogue or projects need basic information on Islamic history, beliefs, and practices.¹ What follows is a brief primer on basic Islamic beliefs and practices about which Christians often have questions:
- a. **Naming God.** *Allah* is Arabic for “God.” It is the primary name of God for all Muslims. Arabic-speaking Christians and Jews also call God “Allah.” When speaking or writing in a language other than Arabic, many Muslims translate “Allah” to that language’s name for “God” in written and spoken discourse. In Islamic tradition, God has ninety-nine Names (attributes)—the most prominent of which are al-Rahman (the Compassionate) and al-Rahim (the Merciful).
 - b. **Qur’an.** The Qur’an (sometimes spelled “Koran”), is Islam’s holy book. Muslims believe it to be God’s speech, transmitted in Arabic through the Prophet Muhammad over a twenty-two-year period. In length it is similar to the New Testament. It contains 114 suras (chapters). Its first sura, the Fatiha (the Opener), which has seven verses, is the core element of Muslim ritual prayer.² The second sura has 286 verses. The remaining suras are progressively shorter (in most cases). Since it is not organized thematically, attempting to read the Qur’an from beginning to end is problematic as a first approach. Consider, instead, following a reading plan offered by a good textbook. For Muslims, translations of the Qur’an are considered “interpretations” rather than the authentic text. Therefore, when exploring it in English (or any other language), it is best to use at least two respected translations and to be careful to acknowledge that you are not working with the authentic text.³ Be aware that, second in authority to the Qur’an is a large body

of literature known as the Hadith (report; tradition). These compendia of sayings and actions of the Prophet Muhammad are records of his Sunna (his example).

- c. **Muhammad.** Muhammad (570–632 CE) is recognized by Muslims as a prophet of God. He is also known as a messenger of God, because he was the conduit for a holy book. Since he is fully human, Muslims do not worship him; but they do revere, him. When mentioning him, it is customary to say, “Peace be upon him.”
- d. **Biblical figures in the Qur’an.** The Qur’an speaks of the stories of Adam, Abraham, Moses, Joseph, and a number of other biblical personalities—Jesus and Mary among them. Christians may be surprised to learn that Jesus and his mother are major figures in Islam. In fact, “Maryam” (Mary) is the name of the nineteenth sura of the Qur’an. The Qur’an calls Jesus “Messiah” and “Word of God,” but the meaning ascribed to these titles differs from Christian use.
- e. **Five Pillars of Islam.** Sunni Muslims speak of the Five Pillars of Islam—five basic practices that frame their life as Muslims:
 - i. **Shahadah:** The assertion of in God and in Muhammad as God’s messenger.
 - ii. **Salat:** A brief worship ritual performed five times daily at specific times, using a fixed text and a set pattern of prostration and other postures. Muslims may perform *salat* more than five times daily. *Salat* may be performed at home or in a *masjid* (place of prostration)—often called a *mosque*.
 - iii. **Fasting:** Abstention from food, drink, and sex from daybreak to sunset during the thirty days of the holy month of Ramadan.
 - iv. **Hajj:** Pilgrimage to Mecca. Muslims are to complete this at least once in their lifetime, provided they are healthy enough to travel and have the financial means to do so.
 - v. **Zakat:** The obligatory annual returning of 2.5% of one’s disposable wealth to the Muslim community for sustenance of the poor, maintenance of places of worship, and several other specific purposes.
- f. **Supplication and remembrance.** In addition to *salat*, Muslims may offer supplication (*dua*) in simple or elaborate forms; they may, as well, worship by chanting one or more of God’s Names—a practice called *dhikr* (pronounced *thikr* or *zikr*), the literal meaning of which is remembrance.
- g. **Holidays.** It is appropriate for Episcopalians to wish Muslim neighbors well on Islamic holidays. Islam employs a non-adjusting lunar calendar. Thus, in relation to the solar calendar, Islam’s months and holidays fall some eleven days earlier each year. A new day (hence a new month) begins at sundown. Depending on their sectarian or cultural identity, some Muslims celebrate holidays that are ignored by other Muslims. However, Muslims the world around observe two principal festivals. *Eid al-Fitr* (pronounced *eed*

al-fitra; the Festival of Fast-Breaking) marks the end of the month of Ramadan (a period of obligatory fasting during daylight hours). *Eid al-Adha* (pronounced *eed al-ahd-hah*; the Feast of Sacrifice) begins on the tenth day of the month in which Hajj (pilgrimage) is made to Mecca, about two-and-a-half months after *Eid al-Fitr*, and extends over four days. It is associated with Abraham's willingness to fulfill God's request to sacrifice his son. Since God substituted a ram for Abraham's son, Muslims who have the means are expected to sacrifice rams (or other unblemished male animals—goats, bulls, camels) on this holiday; or, they may purchase, or contribute toward the purchase of, an animal, which is slaughtered professionally. The meat becomes the centerpiece of the holiday meal shared with family and friends; it is also distributed to the poor worldwide, making this holiday a huge event of outreach and address of world-hunger issues.

- h. **Shari'ah.** Literally, *shari'ah* means the “broad path”—particularly, a path that leads to water. Although the word *shari'ah* is usually translated “Islamic law,” this is misleading. Different from European and American legal systems, *shari'ah* is God-given comprehensive guidance, touching on all aspects of life and reflecting Islam's proclamation of God's intimate concern for justice between human beings. Often, when mention is made of *shari'ah* or Islamic Law in non-Muslim sources, it would be more appropriate to have spoken of *fiqh* (jurisprudence). Many (but certainly not all) Sunni Muslims subscribe to one of the four authoritative “schools” of legal reasoning. Shi'a Muslims have their own. Typically, popular secular media speak of *shari'ah* as something negative only. Episcopalians can work with their Muslim neighbors to lift up examples of *shari'ah* as *ihsan*—the doing of the beautiful.
- i. **Halal.** Islamic legal reasoning (which is informed by the Qur'an, the Prophet's example, consensus, and analogy) defines what is *halal* (permissible), what is *haram* (prohibited), and what falls into several categories in between. Many Muslims strive to eat only foods that are halal or neutral. However, there is some diversity of understanding as to what falls into each category. Most would avoid alcohol and all pork products (including gelatin that are pork-based). Some believe that shellfish are also *haram*. Many will eat meat only if the animal has been slaughtered according to specific Islamic practice; some will accept Kosher meat; for others, “not pork” is a sufficient distinction. Awareness of Muslim dietary attitudes and practices can be helpful to Episcopalians engaged in interreligious collaboration. It is always appropriate to inquire about preferences.
- j. **Jihad.** The noun *jihad* means “struggle.” While it does sometimes refer to armed struggle on behalf of the faith, translating *jihad* as “holy war” is misleading. It comes from a linguistic root meaning “to endeavor, to strive, to labor.” Hence, it can name one's own effort to better one's relationship with God. (In this sense it could be translated as “spiritual discipline.”) It is also a popular given-name for Arab Christians and Muslims alike.
- k. **Hijab.** The root meaning of *hijab* refers to guarding one's modesty (which is expected of Muslim men and women alike). Most often, it refers to one's manner of dress. What constitutes “Islamic clothing” varies from place to place within the compass of The

Episcopal Church's reach. Some Muslims in Europe or the Americas dress according to a style that is traditional in the Middle East, northern Africa, or regions of Asia; others dress according to local norms. *Hijab* is often synonymous with "headscarf"—which some Muslim women never wear (except when praying). Among Muslim women who do wear a headscarf at all times when in public, some accompany it with a *niqab* (face covering). Avoid the assumption that Muslim women who wear a head-covering are oppressed in some way; in fact, some who choose to do so feel empowered by it. Whatever their practice in public, Muslim women cover their hair when in a mosque. Christian women who visit a mosque for any purpose should bring and wear a headscarf as a sign of respect to the host community.

5. **Dialogue and Collaboration.** Given the commitments made through our Baptismal Covenant, dialoguing theologically and making common cause with our Muslim neighbors are indeed acts of faithfulness. When engaging in dialogue and collaboration:
 - a. **Know your dialogue partners.** Are they lifelong Muslims or recent converts? Are they native-born or immigrants? If the former, are they African American or some other ethnicity? If the latter, are they first-generation or second? What cultural and political particularities from their homeland might come with them to the conversation? Again, keep in mind that Muslims (as do Christians) differ among themselves on a plethora of issues.
 - b. **Anticipate gender segregation.** When religious matters are on the agenda, Muslim dialogue partners will most likely be men. Gatherings organized by Muslims, especially those held in local mosques, often practice gender segregation in prayer areas and places of socializing, dining, and fellowship. When in dialogue, fellowship, or collaboration with Muslims, it is helpful to know that many of them prefer to avoid handshaking with people of a different gender. Some Muslims may disapprove of The Episcopal Church's stance on LGBTQ understandings or policies. Episcopalians in dialogue with Muslims need to be aware of the reality of that possibility.
 - c. **Be aware of the Islamic clock.** When planning events with members of the Muslim community, it is respectful to be aware of the times of Islamic daily prayer in one's locale and to accommodate them in the event schedule. Episcopalians might simply ask Muslim planning partners how they would prefer to do so.
 - d. **Be aware of the Islamic calendar.** When planning interfaith events, take note of the dates of the two *Eids* and avoid scheduling interfaith events on those days. Take note also of the dates for Ramadan. Most Muslims are particularly busy during that month and their day is very much focused around when the fast can be broken. If an interfaith event is planned during Ramadan, avoid a focus on food during the hours of fasting. Non-Muslims are not obligated to join in this practice. However, they can be considerate of those who are fasting. On every evening of Ramadan, *iftar* (fast-breaking) is a special time—and many Muslims are eager to include neighbors and friends in the feasting that follows. Episcopalians who are invited to an *iftar* might take a small gift of nuts, dried fruits, or sweets.

- e. **Label negative behavior appropriately.** When speaking and writing of blatant, virulent, aggressive, promotion of negativity about Islam and Muslims, consider avoiding the term “Islamophobia”—which, literally, means “fear of Islam.” Referring to “anti-Muslim bigotry” is often far more accurate. Whatever it is called, aggressive anti-Islamic or anti-Muslim rhetoric promotes attitudes and overt behavior contrary to Episcopal Baptismal Covenant promises to strive for justice and peace among all people, to seek and serve Christ in all persons, and to love one’s neighbor as oneself.

6. Making common cause. While our understandings of salvation history differ considerably, Episcopalians and Muslims can participate collaboratively in God’s mission in three traditional ways: mitigating human need, challenging structural injustice, and caring for creation. The Islamic principle of *ihsan* (doing the beautiful; defined by tradition as behaving as though one can see God because, without doubt, one is *seen by* God) offers a basis on which Christians may join with Muslims in loving service to God, ecological stewardship, and concerted effort toward the public good.

7. Resources for deepening understanding. This collection of guideposts is a starting-point. Recommendations of print and AV resources about Islam or Christian-Muslim engagement are available from the Office of Ecumenical and Interreligious Relations. For resources for dialogical close reading of scripture (Bible and Qur’an) and other theological texts, see the archives of the Building Bridges Seminar.⁴

¹ Among the many fine sources for such information, see Amir Hussain, *Oil & Water: Two Faiths, One God* (Kelowna, BC: CopperHouse, 2006), which provides a Muslim scholar’s concise introduction to Islam and Christian-Muslim understanding. For an in-depth introduction to Islam, see Sachiko Murata and William C. Chittick, *The Vision of Islam* (St. Paul, MN: Paragon House, 1994).

² *Fatiha* is pronounced with stress on the first and third syllables.

³ The translation by M. A. S. Abdel Haleem (New York: Oxford University Press, 2009) and *The Study Quran: A New Translation and Commentary* (New York: Harper Collins, 2017)—prepared by Seyyed Hossein Nasr and a team of translators—are highly regarded.

⁴ The Building Bridges Seminar is an ongoing dialogue of Christian and Muslim scholar-believers, founded by the Archbishop of Canterbury in January 2002, under stewardship of Georgetown University since July 2012. [New URL pending]

EPISCOPAL-PRESBYTERIAN AGREEMENT ON LOCAL SHARING OF MINISTRIES

PARTICIPANTS

Representing the Episcopal Church: the Rt. Rev. Eugene Taylor Sutton, the Rev. Canon Elise Johnstone, Dr. Michael Booker, Elizabeth Ring, the Rev. Joseph Wolyniak; and Office of Ecumenical and Interreligious Relations staff, Mr. Richard Mammana and the Rev. Margaret Rose.

Representing the Presbyterian Church (U.S.A.): Ruling Elder Dr. Anne Bond, the Rev. Dr. Neal Presa, the Rev. Terri Ofori, the Rev. Dr. Christian Boyd, the Rev. Dr. Robert Foltz-Morrison, the Rev. Brooke Pickrell, the Rev. Brian Entz; and staff liaison from the Office of the General Assembly, Ruling Elder Dr. Dianna Wright.

PREAMBLE: The Urgency of the Times

Such a Time as This: Pandemic and Racial Endemic

The Book of Esther recalls a time of great challenge for people of faith to act. So too, our current time finds our world amid many challenges—not least, experiencing a pandemic with as-yet-unknown overall effects on the Church. The global Christian Church has found itself in a season of reinvention and redefinition.

Individual congregations are challenged to adapt to a changing world, straining links with the past and old ways of doing church. In so doing, we have refocused on the core duties of being Christ in the world. This has created both challenges and opportunities.

Our time stands in particular need of unity. Both the Presbyterian Church (U.S.A.) and The Episcopal Church acknowledge the historical and present reality of sin, racism, and white supremacy that denies the impartiality of God, the reconciling work of Christ, the gift of the Holy Spirit poured forth into all persons. We acknowledge our complicity and calling to end all racial discrimination, repenting of and ministering to those injured by it. We cannot remain silent about this divisiveness, nor did Christ: “Jesus knew what they were thinking, and so he said to them, ‘Any country that divides itself into groups which fight each other will not last very long. And any town or family that divides itself into groups which fight each other will fall apart’” (Matthew 12:25, GNT). Reform always comes from the margins, whether the prophetic voice crying in the wilderness or activists on city streets protesting the death of another person of color (as if Black lives do not matter).

Accordingly, there is a present and historical urgency borne in this agreement to move both churches toward that unity in mission. The triune mission of God is the foundation of the Church’s unity and its mission in the world. It is among the last of Jesus’ prayers: “That they may all be one, just as you, Father, are in me, and I in you, that they also may be in us, so that the world may believe that you have sent me” (John 17:21, ESV). This document represents the culmination of many decades of dialogues between The Episcopal Church in America and the Presbyterian Church (U.S.A.).¹

¹END NOTES

The Episcopal Church and the Presbyterian Church (U.S.A.) have been in ecumenical dialogue since 1886. See William Henry Roberts. *The Correspondences Between the Committee on Church Unity of the General Assembly of the Presbyterian Church in the U.S.A. and the Commission on Christian Unity of the General Convention of the*

The Church, guided by God’s wisdom, can embrace this opportunity and examine how ecclesial bodies can work together.

Tearing Down Ecclesiastical Barriers

Old walls had prevented mission and ministry together. In this time of notable change, the participants of the bilateral dialogue between The Episcopal Church and the Presbyterian Church (U.S.A.) invited our ecclesial bodies—the General Convention 2022 and General Assembly 2022—to consider this limited exchange agreement on the local sharing of ministries. Both bodies affirmed the initiative and the church-wide study. We received feedback from both communions and the ecumenical dialogue places this proposed agreement before both the General Assembly and the General Convention for consideration and action in 2024.

The old walls preventing work together have been torn down through a vastly changing world and church context. With the foundation of the 2008 Episcopal Presbyterian Agreement, our common full communion partner (the Evangelical Lutheran Church in America) and shared partnership with the Moravian Church—Northern and Southern Provinces,² our work together through Churches Uniting in Christ, and our work together in public witness as well as numerous collaborative local ministries, a pathway has been created for continued mission and ministry together, toward the unity that God calls us to.

Thus, the Presbyterian/Episcopal Dialogue requests our respective authorizing bodies to consider the following Agreement; to continue the Dialogue with future deliberations; and that our respective Heads of Communion commit themselves publicly to this effort and to consider a public celebration of our progress to date and our hope for the future.

“Oh, how good and pleasant it is, when kindred live together in unity!” (Psalm 133:1, *The St. Helena Psalter*)

INTRODUCTION³

The Church does not live for itself. It is called into being by the Gospel of Jesus Christ to serve the mission of the triune God in the world. “The Church belongs to God. It is the creation of God’s Word and the Holy Spirit. It cannot exist by and for itself.”⁴ The mission of God is a single all-embracing mission that confronts the Church with a range of complementary tasks. Impelled by the joyful duty of giving praise and thanks to God for all the blessings of creation and redemption, the Church seeks to serve God by making known the Good News of salvation and by meeting human need wherever it finds it. In accordance with God’s purpose to “gather up all

Protestant Episcopal Church in the U.S. (Philadelphia: General Assembly of the Presbyterian Church in the U.S.A.), 1896).

² The Episcopal Church is in full communion and the Presbyterian Church (U.S.A.) has a covenant agreement with with the Moravian Church.

³Adapted from *For the Sake of the Gospel: Mutual Recognition of Ordained Ministries in the Anglican and Uniting Churches in Australia*, 2001.

⁴*The Nature and Purpose of the Church*, Faith and Order Paper No. 181 (Geneva: WCC, 1998), §9.

things in Christ” (Ephesians 1:10), the Church is called to embody with anticipation the reconciliation and communion of all people.

The Church knows well that its mission is compromised at every point by its disunity, which continues at many levels despite the great ecumenical achievements of the last century. How can the Church credibly proclaim the unity of humankind when it is too fractured to recognize a common baptism and to gather around one eucharistic table in the one apostolic faith? We have institutionalized divisions in the Church and come to accept them as normal, forgetting that they are a stumbling block and a barrier to faith for many. We overlook the fact that they stand in conflict with the will of Christ and amount to a refusal of the unity which is his gift.

The witness of the Church—its service of the *Missio Dei*—will be greatly enhanced by overcoming historic divisions between the churches.⁵ The removal of barriers between our two churches, The Episcopal Church and the Presbyterian Church (U.S.A.), while not providing an instant or complete solution to the problems and challenges confronting the Church, will be a step of great importance, especially when seen together with other comparable steps under consideration by our churches. In many and varied contexts, diverse ecclesial communities have benefited greatly from the sharing of ordained ministries. Our two churches could expand in the joint planting of new worshipping communities and partner in united or federated parishes (referred to as *ecumenical congregations*).⁶ The matter is not less urgent, nor are the advantages less significant, in the deepening of our covenant relationship in order to establish new eucharistic communities and mission projects which feed the body, mind, and souls of God’s people.

The proposals in this paper are formulated out of our obedience to the Gospel and the better discharge of our call to mission. Unity is for the sake of God’s mission. Changes in the socioeconomic pattern of life in the U.S. in recent years provide an opportunity to develop the unity between our two churches. When Christians demonstrate in their lives that the barriers which divide the rest of society do not divide the Church, the Gospel is proclaimed. We may be certain that we are called, together, to grow in mission, the mission of the Church, within the mission of the triune God.

AFFIRMING THE CURRENT ECUMENICAL AGREEMENT

This group affirms the current Episcopal Presbyterian Agreement of 2008, including the following accords:

1. We acknowledge one another’s churches as churches belonging to the one, holy, catholic, and apostolic Church;
2. We acknowledge that in our churches the Word of God is authentically preached and the sacraments of Baptism and Eucharist are duly administered;

⁵ *The Book of Common Prayer* (1979), p 855: “The mission of the Church is to restore all people to unity with God and each other in Christ.”

⁶ *Together Towards Life: Mission and Evangelism in Changing Landscapes*. Edited by Jooseop Keum (Geneva: WCC, 2013).

3. We acknowledge one another's ordained ministries as given by God and instruments of grace, and look forward to the time when the reconciliation of our churches makes possible the full interchangeability of ministers;
4. We acknowledge that personal and collegial oversight (episcopate) is embodied and exercised in our churches in a variety of forms, episcopal and non-episcopal, as a visible sign of the Church's unity and continuity in apostolic life, mission and ministry;
5. We agree that authorized ministers of our churches may, subject to the regulations of the churches and within the limits of their competence, carry out the tasks of their own office in congregations of the other churches when requested and approved by the diocesan bishop and local presbytery;
6. We agree that The Episcopal Church will invite members of the Presbyterian Church (USA) to receive Holy Communion in their churches and the Presbyterian Church (USA) will invite members of The Episcopal Church to receive Holy Communion in their churches. We encourage the members of our churches to accept this Eucharistic hospitality and thus express their unity with each other in the one Body of Christ;
7. We agree to continue to dialogue in the areas such as diaconal ministries, historic episcopate, the office of elder, etc. that would lead to full reconciliation of our ministries and interchangeability of our ministers;
8. We encourage diocesan bishops and presbyteries to provide regular occasion for planning, discussing, resourcing for missional, educational and liturgical life together. In addition, to explore possibilities for new church development and redevelopment together;
9. We agree to develop a process to support and implement the above recommendations; and
10. We affirm these proposals mark an important step in moving toward the full, visible unity of the Church. We know that beyond this commitment lies a move from the recognition to the reconciliation of churches and ministries within the wider fellowship of the universal Church.

In summary, we recognize and affirm the validity of our respective churches: providing word and sacrament, ordered ministries, as well as the embodiment and exercise of the ministry of oversight (communally, collegially, and personally). We also recognize that the divergence in equally valid ecclesiastical polities, alongside existing church traditions and customs, limits the interchangeability of ordered ministers and thus full communion at this time. Despite this recognition, this group believes we have prayerfully discerned a way forward for our two churches to continue journeying together in a complementary manner and enriching each other as we participate in the mission of God.

THE WAY FORWARD

In our current agreement, our two churches agreed "that authorized ministers of our churches may, subject to the regulations of the churches and within the limits of their competence, carry out the tasks of their own office in congregations of the other churches when requested and

approved by the diocesan bishop and local presbytery.” Furthermore, a conditional was established on this point: “because we do not yet have reconciliation and full interchangeability of ordained ministries, all authorization for these special opportunities must conform to the *Book of Common Worship* and the *Book of Order* of the Presbyterian Church (U.S.A.), and the *Book of Common Prayer* and the *Constitution and Canons of The Episcopal Church*.”

Our current agreement also calls the two denominations to “encourage diocesan bishops and presbyteries to provide a regular occasion for planning, discussing, resourcing for missional, educational, and liturgical life together. In addition, to explore possibilities for new church development and redevelopment together,” as well as provide a process to support and implement the above recommendations (guidelines).

Our two churches have agreed to be in continued dialogue concerning the mutual recognition of ordained ministries, as a step towards the unity that is Christ’s will for his Church. Our current agreement enabled The Episcopal Church and the Presbyterian Church (U.S.A.) to formally and publicly participate in the Churches Uniting in Christ recognition of ordered ministry (June 2017). This public proclamation underscores and casts away possible barriers to our current agreement to move forward in missional partnership.

On the basis of converging but not yet wholly compatible understandings of the ordained ministry—with a sufficient agreement in faith and ministry, alongside a continued partnership of our two churches over recent decades—this group proposes that our churches deepen our current relationship.

Sharing in ecumenical ministry

We agree with the World Council of Churches’ 2013 *The Church: Towards a Common Vision* in regard to ordered ministry,

there is no single pattern of ministry in the New Testament, though all churches would look to Scripture in seeking to follow the will of the Lord concerning how ordained ministry is to be understood, ordered and exercised. At times, the Spirit has guided the Church to adapt its ministries to contextual needs (cf. Acts 6:1–6). Various forms of ministry have been blessed with the gifts of the Spirit. Early writers, such as Ignatius of Antioch, insisted upon the threefold ministry of bishop, presbyter and deacon. This pattern of three related ministries can be seen to have roots in the New Testament; eventually it became the generally accepted pattern and is still considered normative by many churches today... Among the several means for maintaining the Church’s apostolicity, such as the scriptural canon, dogma and liturgical order, ordained ministry has played an important role. Succession in ministry is meant to serve the apostolic continuity of the Church.⁷

Both The Episcopal Church and the Presbyterian Church (U.S.A.) reflect the threefold ordered ministries expressed by Ignatius of Antioch (bishop, presbyter, and deacon), “locally adapted” in our respective polities. Thus, both denominations hold, in the broad ecumenical sense, apostolic

⁷*The Church: Towards a Common Vision* (Faith and Order Paper No. 214) (Geneva: WCC, 2013), 26. Cf. Ignatius of Antioch’s Letter to the Magnesians 6 and 13; Letter to the Trallians 7; Letter to the Philadelphians 4; Letter to the Smyrnaeans 8.

succession.⁸ Both The Episcopal Church and the Presbyterian Church (U.S.A.) have recognized the gift of *episkopé*, the ministry of oversight, locally adapted, as expressed in the 2017 Churches Uniting in Christ mutual recognition or ordered ministry. Specifically, the ecumenical dialogue between The Episcopal Church and the Presbyterian Church (U.S.A.), in round two and round three, recognized that diocesan bishops and presbytery moderators have similarly constituted ecclesial authority and expression of the gift of *episkopé* as it relates to presiding at ordination, as well as the inauguration of a presbyter to a pastoral relationship, or commissioning and blessing a new ministry.

⁸ Presbyterians also hold historic *episkopé* locally adapted. The PC(USA)'s official response to the *Baptism, Eucharist, and Ministry* shared the Reformed tradition's understanding of "Apostolic succession" to include continuity in the apostolic tradition, apostolic faith, the apostolicity of the Church's witness, and the church's ordered ministry (See https://www.pcusa.org/site_media/media/uploads/oga/pdf/bem.pdf)

In the Reformed tradition, *episkopé* is corporate and not personal, tracing back to the Church of Scotland, predominantly the Presbytery of Glasgow, through presbyteries—and also to Scotland's offices of Superintendent, as well as Bishop, who personally presided at ordinations. However, in the act of ordination, there is a personal form of *episkopé* exercised in the role of the presbytery and session moderators as they preside over the worshipful act (W.M. Hetherington. *History of the Church of Scotland: from the Introduction of Christianity to the Period of the Disruption in 1843*, New York: Robert Carter and Brothers, 1856; Jenny Wormald. *Court, Kirk, and Community: Scotland 1470-1625*, Edinburgh: Edinburgh University Press, 1981, pp. 75-142; John Knox, C.J. Guthrie ed., *The History of the Reformation in Scotland*, London: Adam and Charles Black, 1898, pp. 228, 249).

Until 1688, the polity and terms of *episkopé* varied. Some years there was a bishop, exercising personal *episkopé*, in other years the office of bishop was assumed into the presbytery as a corporate expression of *episkopé*... and then back again. The Church of Scotland in 1688 finally resolved to remove from its Presbyterian polity the functionary role of the Bishop as regional administrator and liturgical overseer as common within the Roman and Anglican tradition. Those formerly consecrated as bishops within the Roman and Church of England rite, or the hybrid Presbyterian-Episcopal rite between 1578 and 1688, and who desired to remain in communion with the Church of Scotland would now truly function as pastors of congregations with a college of presbyters. Thus, the historic *episkopé* was therefore permanently assumed into the communion of the people and embodied personally within the moderators of the ordaining councils, the sessions and presbyteries.

Additional ecumenical documents and bodies to consult are the 2021 St Andrew Declaration between the Scottish Episcopal Church and the Church of Scotland, as well as the 2016 St Columba Declaration between the Church of Scotland and the Church of England.

In *The Book of Order of the Presbyterian Church in the United States of America* (Philadelphia: PCUSA, 1789), "bishop" and "pastor" are interchangeable, and it is the pastor, as moderator of the session, that oversees as a member of the presbytery and presides at the ordination of elders and deacons (c.f., "The Successor to Peter: A Paper for Discussion from the Presbyterian Church (U.S.A.)," Discussion PC(USA) and Pontifical Council for Promoting Christian Unity. Louisville, Kentucky, December 6-7, 2000): endnote 5, "It may be of some interest that prior to the 1983 reunion of the northern and southern branches of Presbyterianism, the Book of Order of the northern branch, the United Presbyterian Church in the U.S.A., offered several titles for ministers of Word and Sacrament, among them the title 'bishop.' If one looks, say, at the roll calls in the minutes of the Presbytery of Philadelphia around the middle of the nineteenth century one will read 'The following bishops were in attendance....' The concept was that every installed pastor of a congregation is bishop of a congregationally constituted diocese. He or she is surrounded by presbyters or 'elders' and assisted by 'deacons.'" Here, on a small scale, as a parochial diocese, Presbyterians have the historic threefold ministry expressed by Ignatius.

Guided by the World Council of Churches' 1982 foundational paper, *Baptism, Eucharist, Ministry*, Chapter VI, as well as 2013 *The Church: Towards a Common Vision* (Faith and Order Paper No. 214), presbyteries and dioceses are strongly encouraged to invite presbytery moderators and diocese bishops to participate in each other's celebrations of ministry, not only ordinations but also celebrations of a new ministry, wherein bishops and moderators share an ecumenical blessing. It is also strongly encouraged in their ordination of presbyters, each also includes bishops from other denominations with whom each church shares recognition of mutual ministry (i.e. Evangelical Lutheran Church in America and Northern Province and the Southern Province of the Moravian Church in America). Finally, we fervently pray that when a presbytery moderator is installed, an Episcopal bishop (or designee) be present, and when an Episcopal bishop is ordained, a Presbyterian moderator (or designee) be present; and both be invited in those moments of celebration to share an ecumenical blessing.

Limited orderly exchange of ministers

Within the current agreement (2008–2009), and without exceeding the discretion of The Episcopal Church bishops and Presbyterian Church (U.S.A.) presbyteries, there shall be provision for the following exchange of ordered ministers between our churches:

- the acceptance of Episcopal presbyters (those ordained and referred to as *priests*) in Presbyterian placements and in ecumenical ministries where the Presbyterian Church has the right of appointment;
- the acceptance of Presbyterian presbyters (specifically those ordained and consecrated to the ministry of the word, sacrament, and teaching, referred to as *ministers of word and sacrament* or *teaching elders*) in Episcopal appointments, such as ecumenical ministries and cooperating parishes where The Episcopal Church has the right of appointment.

This agreement does not enable ordained Ruling Elders and Commissioned Pastors (also known as Commissioned Ruling Elder) of the Presbyterian Church (U.S.A.), nor deacons of The Episcopal Church or Presbyterian Church (U.S.A), to be considered.

THE GUIDELINES FOR LIMITED ORDERLY EXCHANGE OF MINISTERS

For missional purposes and in consultation between the diocesan bishop and local presbytery, a presbyter may be licensed (permitted) by the appropriate Ecclesiastical Authority to serve under the following guidelines.

The limited orderly exchange process begins with the identification of a ministry needed by the appropriate Ecclesiastical Authority of the inviting body and the identification of a presbyter from the sending body who may serve in that ministry setting.

The Ecclesiastical Authority of the inviting body initiates the process of the limited orderly exchange between the presbyter and the placement or ecumenical ministry to be served. The presbyter does not initiate the exchange process.

The inviting body shall consult with the appropriate Ecclesiastical Authority of the presbyter to determine the suitability of the potential service and to receive the concurrence of the sending body. The presbyter remains accountable to the sending church for the continuation of ministerial status.

Both The Episcopal Church and the Presbyterian Church (U.S.A.) agree that experience in and knowledge of one's own tradition is seen as necessary before serving in a different tradition. Therefore, the limited orderly exchange is only open to presbyters who have been ordained for at least three years and are active within the ministry of their denomination.

Presbyters serving in a limited orderly exchange position shall be temporary under this agreement. The service of presbyters should ordinarily be for a two- to four-year period, which may be renewed. Should a presbyter of one church intend to serve permanently in another church, the process of the transfer or reception of ministerial status should be followed according to the rules of the receiving Church.

Should a disciplinary process be necessary, the presbyter remains under the jurisdiction of the sending body, but the inviting body may be asked to participate as necessary.

Pension and medical coverage are through the church of ecclesiastical membership.

Functions

When a presbyter is invited by the appropriate Ecclesiastical Authority, the presbyter is authorized to:

- to exercise pastoral and/or administrative responsibility;
- lead public worship as a presbyter under the direction of a diocesan bishop or presbytery;
- preach the Gospel;
- celebrate and administer the sacraments within the guidelines specified below;
- prepare persons for Baptism, Confirmation, Reception, and the Reaffirmation of Baptismal Vows, and shall function under the direction of diocesan bishop or presbytery;
- and present the good news of Jesus Christ in such a way that people are led to receive Christ as Savior and follow Christ as Lord in the fellowship of the Church, assisting with the diocese or presbytery's ministry of evangelism partnership.

While a presbyter serves a particular placement or ecumenical setting because we do not yet have reconciliation and full interchangeability of ordained ministries, as stated in the 2008 agreement, all authorization for these special opportunities must conform to the Constitution of the Presbyterian Church (U.S.A.), and the Constitution and Canons of The Episcopal Church. What this means explicitly is that:

- All presbyters are bound to their denomination's authoritative liturgical mandates and resources regarding the Eucharist when they preside or are the celebrant in their particular placement or ecumenical setting of joint witness;
- All presbyters may use authorized or commended worship resources of the Evangelical Lutheran Church in America, with whom both churches are in full communion, including the Eucharist liturgies, with the authorization of the inviting Ecclesiastical Authority; and
- All presbyters will be trained, authorized, and mentored in the ecclesiastical polity, customs, and traditions by the inviting Ecclesiastical Authority.

Training, Examination, and Oversight

A presbyter who serves under the terms of this Agreement on Limited Orderly Exchange of Ministers shall receive such preparation and instruction, or formation, as determined by the diocesan bishop or presbytery to be appropriate to the particular placement or ecumenical setting, and the length of time shall be determined by the Ecclesiastical Authority's own rule.

The presbyter shall be examined by the appropriate Ecclesiastical Authority as to personal faith, motives for seeking to serve, and the areas of instruction determined by diocesan or presbytery.

The presbyter authorized under the terms of this Agreement shall work under the supervision and mentoring of the diocesan bishop or presbytery. A presbyter shall be assigned to the invited presbyter as a mentor and local supervisor.

An authorization may be for no more than four years, and no less than two. Within an appropriate time before the expiration of the invitation, the presbyter shall review the covenant relationship with the diocesan bishop and presbytery. The invitation may be renewed with the consent of all interested parties (i.e., diocesan bishop and presbytery, presbyter, and authorized representative(s) of a particular placement or ecumenical ministry).

The diocesan bishop or presbytery may at any time withdraw this authorization for reasons it deems good and sufficient.

A presbyter who has been authorized and later ceases to serve in the specified ministry may continue to be listed as available to serve. However, they are not authorized to perform the functions specified above until an invitation is renewed in order to serve in a placement or an ecumenical setting by the appropriate Ecclesiastical Authority.

PRESBYTERIAN GLOSSARY

Apostolic function of *episkopé: the apostolic function of those who oversee the ministry of the church, as reflected in various New Testament texts, is the function exercised by the apostles in spreading the Gospel and exists so that the Church maintains its witness to Jesus Christ.

***Apostolic succession**: continuity with the ministry of the early church, especially the disciples of Jesus. Reformed and Roman Catholics believe that there is an apostolic succession, though they locate that succession differently. The Reformed tradition understands apostolic succession to also include continuity with the apostolic tradition, apostolic faith, and the apostolicity of the Church's witness.

***Apostolic era**: the period of the history of Christianity when the original apostles of Jesus were still alive.

The Book of Common Worship (BCW): a liturgical resource in the Presbyterian Church (U.S.A.) consisting of various liturgies and prayers consistent with the *Directory for Worship* section of Book Two of the Constitution, *The Book of Order*. The BCW's most recent edition was published in 2018.

***Catholicity**: as described in the baptismal catechesis of Cyril of Jerusalem, refers not simply to geographic extension but also to the manifold variety of local churches and their participation in the fullness of faith and life that unites them in the one community.

Church: the one holy catholic apostolic church in every time and in every place. Depending on context, may also refer corporately to an ecclesial communion/denomination, e.g. The Episcopal Church, the Presbyterian Church (U.S.A.).

Churches: fellowship of ecclesial communions/denominations, e.g. Churches Uniting in Christ, World Council of Churches, World Communion of Reformed Churches.

church (lowercase "c"): the local expression of an ecclesial communion/denomination, i.e., congregation, parish.

Commissioned Pastor (also known as commissioned ruling elder): a ruling elder authorized by a presbytery to limited pastoral service assigned by a presbytery for a limited time. Commissioned pastors may be authorized by the presbytery to moderate session, administer the sacraments, and officiate marriages where permitted by state law.

Commissioning: an act of God through the voice of the Church whereby a council of the Church authorizes, blesses, and entrusts to an individual, usually one who is in ordered ministry, to discharge the duties and responsibilities of a particular ministry.

***Communion(s)**: the community fellowship gathered at the table together. Since we have not yet realized the goal of all churches being in communion with each other—essentially recognize our being one Church as Christ prayed we would be—we are different communions gathering at different tables with only imperfect unity in Christ.

Constitution of The Presbyterian Church (U.S.A.): the governing documents that frame the ecclesial life of the Presbyterian Church (U.S.A.). The Constitution consists of two parts: Book One is *The Book of Confessions*, expressing in twelve creeds, catechisms, confessions, and statements of faith what Presbyterians believe; and Book Two is *The Book of Order*, expressing how Presbyterians live out their confessional belief with respect to governance, church discipline, and principles of worship.

Councils: duly constituted gatherings of ruling and teaching elders for discernment and decision-making for the spiritual welfare of the church. The councils of the church are the session, presbytery, synod, and General Assembly. Each council is distinct but mutually related to one another, the action of one council is understood to be an action on behalf of the whole and the whole church's act through that appropriate council, with the larger part of the church, or a representation thereof, governing the smaller. The session consists of all teaching elders serving in a local congregation and active ruling elders. Presbytery, synod, and General Assembly consist of an equal number of teaching and ruling elders. (Adapted from *The Book of Order*, F-3.0203)

Covenant Partnership: an ecclesiastical and ecclesial relationship whereby each participating communion acknowledges that it is undertaking a serious commitment, one that involves actions as well as words. Covenant partnership cannot be achieved without awareness of existing differences and similarities among the partners; it will demand dedication to walking and working together in ways that may, at times, represent a break with the past. Walking together involves not only the likelihood, but also the certainty of mutual challenge and change; because of this commitment, each body will eventually be different in ways that presently cannot be seen. The partner churches commit themselves to this new relationship with seriousness of intent, and full assurance that the One who calls us to greater visible unity is faithful and worthy of trust. (*Presbyterian Church (U.S.A.) Covenant Agreement with the Moravian Church*, p. 9)

***Diakonia:** the ministry of service. Many churches ordain deacons; in others deacons are officers of the church but not ordained.

***Ecclesiology:** the theology of the nature and purpose of the church.

***Ecumenicity:** the character of being ecumenical—being concerned with the unity of the churches.

***Episcopacy:** the office of oversight of the church and its ministry. Every church has some way of overseeing the church, keeping it faithful to the Gospel, fostering its unity, and overseeing the work of the ministry and the work of the church in service to the world. In this dialogue, we have focused on episcopacy as a central ecumenical issue. Thus in this document the meanings of episcopacy are somewhat different in each communion.

***Episkopé:** a Greek word meaning “oversight” from which we get the English word “episcopal,” indicating reference to a bishop or governance by bishops. In ecumenical dialogue, the use of the word *episkopé* has become the standard way to refer to the ministry of oversight, which includes, but is not limited to, the office of bishop. This use of *episkopé* has also become a way to invite those churches that have not retained the episcopal office to recognize that the ministry of that office is nevertheless present in and vital to their churches.

Executive Presbyter/General Presbyter: a chief administrative staff member employed and called by a presbytery to help provide pastoral care and guidance, administrative functions, and other such duties as determined by a presbytery in order to effectively support the mission and ministries of congregations, validated ministries, and teaching/ruling elders in that presbytery.

***Feast of Eucharist:** the Lord's Supper, the word "Eucharist" means "thanksgiving," the feast of the Lord's Supper is a meal of thanksgiving. Also known as Holy Communion to denote that in the feasting of the bread and cup, the assembled community is in communion with the triune God and with the Church universal in every time and in every place.

Full Communion: an ecclesiastical and ecclesial relationship between churches characterized by the following: recognition of each other as churches in which the gospel is rightly preached and the sacraments rightly administered according to the Word of God; withdrawal of any historic condemnation by one side or the other as inappropriate for the life and faith of our churches today; continuation of recognition of each other's Baptism and authorize and encourage the sharing of the Lord's Supper among their members; recognition of each other's various ministries and make provision for the orderly exchange of ordained ministers of Word and Sacrament; establishment of appropriate channels of consultation and decision-making within the existing structures of the churches; commitment of themselves to an ongoing process of theological dialogue in order to clarify further the common understanding of the faith and foster its common expression in evangelism, witness, and service; pledge themselves to living together under the Gospel in such a way that the principle of mutual affirmation and admonition becomes the basis of a trusting relationship in which respect and love for the other will have a chance to grow. (*A Formula of Agreement Between the Evangelical Lutheran Church in America, the Presbyterian Church (U.S.A), the Reformed Church in America, and the United Church of Christ on Entering into Full Communion on the Basis of "A Common Calling," p. 1*)

Holy Orders: also known as ordered ministry, these designate ordained offices into which women and men are called by God and confirmed by councils of the church to serve the people of God. These offices include bishop/priest, pastor, elder, and deacon.

Interchangeability: mutual recognition and mutual exchange of ordained ministers between two communions who have been duly authorized and commissioned by their respective ecclesiastical authority (diocesan bishop or presbytery).

Installation: a liturgical service whereby a council of the church officially places an ordinand in a particular ministry. An installed ordinand is ready to be commissioned with specific responsibilities and duties.

***Koinonia:** a Greek word meaning community, communion, or fellowship.

***Legitimate diversity:** legitimate diversity is diversity that does not violate a legitimate norm. Churches differ in what they consider legitimate diversity to include. "The Unity of the Church: Gift and Calling—The Canberra Statement" of the World Council of Churches, 1991 states that, "Diversity is illegitimate when, for instance, it makes impossible the common confession of Jesus Christ as God and Saviour the same yesterday, today and forever (Hebrews 13:8); salvation and the final destiny of humanity as proclaimed in Holy Scripture and preached by the apostolic community."

Minister of Word and Sacrament (also known as a Teaching Elder): an ordained office in Presbyterian polity to exercise spiritual leadership in and through the councils of the church by the ministries of preaching and teaching the Word, administering the Sacraments, and attending to the health of ecclesial life in a ministry context.

Moderator: a constitutional office of the various councils of the church whose origin is from the Church of Scotland, representing the unity of the Church in council. The office of moderator is to preside over the proceedings of the appropriate council, guiding the council to discern the will and mind of Christ, ensuring that such deliberation is done “decently and in good order” (1 Corinthians 14:40). The moderator of a session is usually a teaching elder of a local congregation, or a commissioned pastor authorized by a presbytery, or another presbyter authorized by a presbytery. The moderators of a presbytery, synod, and General Assembly are elected by that respective council. The Moderator/Co-Moderators of the General Assembly is an ambassador of the Assembly, representing the “sign of the bond of unity, community, and mission in the life of the church” (*Organization for Mission*, IV.A.2, pp. 6-7).

Ordered Ministry: Christ’s ministry and authority exercised through the ministry of the whole people of God, from whom certain women and men are specially called to particular functions in specific offices. The New Testament describes two primary ordered offices and their ordered ministry: the office of deacon to the ordered ministry of *diakonia* and the office of presbyter to the ordered ministry of Word and Sacrament (in the case of teaching elder) and the ordered ministry of shared governance (in the case of ruling elder).

Ordinands: individuals who are inquiring or candidates for ordination to the ministry of Word and Sacrament and who are under care by a session and a presbytery.

***Presbyterian and presbyterian:** presbyterian refers to a form of church organization in which the governance of the church is in the hands of the elders (*presbyteros*, Greek). Presbyterian with a capital *P* is the name of particular churches, which characterize themselves by their presbyterian polity and subscribe to the Reformed theological tradition.

Presbytery: a governing council in Presbyterian polity consisting of an equal number of teaching elders (Ministers of Word and Sacrament) and ruling elders commissioned by the sessions of local congregations in a designated region.

***Recognition:** “Accept[ing] the legitimacy and authenticity of other churches as the Church in the dialogical process towards fuller communion” (Timothy T. N. Lim, *Ecclesial Recognition with Hegelian Philosophy, Social Psychology, and Continental Political Theory* [Boston: Brill, 2017], 5).

Reformed: a Protestant theological tradition that is “in continuity with the classical Reformed theologians of the sixteenth century like Calvin and Bullinger, for example, and with the confessions of that tradition” (Jane Dempsey Douglass, “What is Reformed Theology?” *The Princeton Seminary Bulletin* 11, no. 1 (1990): 4).

Ruling elder: active members in a local congregation who have been elected by a local congregation, and ordained and installed by that congregation’s session to exercise shared spiritual leadership in the session and councils of the church with teaching elders.

Sacraments: “the Word of God enacted and sealed in the life of the Church, the body of Christ. They are gracious acts of God, by which Christ Jesus offers his life to us in the power of the Holy Spirit. They are also human acts of gratitude, by which we offer our lives to God in love and service. The Sacraments are both physical signs and spiritual gifts, including words and actions, surrounded by prayer, in the context of the Church’s common worship. They employ ordinary things—the basic elements of water, bread, and wine—in proclaiming the extraordinary love of God. The Reformed tradition recognizes the Sacraments of Baptism and the Lord’s Supper (also called Eucharist or Holy Communion) as having been instituted by the Lord Jesus Christ through the witness of the Scriptures and sustained through the history of the universal Church” (*The Book of Order*, W-3.0401).

Session: a local governing council in Presbyterian polity consisting of the pastoral staff and ruling elders of a local congregation.

Stated Clerk/Clerk of Session: a constitutional office of the various councils (called a clerk of session in the case of a session) who preserves and defends the Constitution of the Presbyterian Church (U.S.A.), with the moderator of the appropriate council interpret the actions of that council, and insures the accurate recording of the appropriate council’s deliberations. The Stated Clerk of the General Assembly is understood to be the head of communion, and together with the Moderator/Co-Moderator of the General Assembly represents the unity of the Church. The Stated Clerk of the General Assembly is the chief ecumenical officer of the Presbyterian Church (U.S.A.) and is the chief executive officer of the Office of the General Assembly, one of six national agencies of the Presbyterian Church (U.S.A.).

Synod: “the intermediate council serving as a corporate expression of the church throughout its region. It shall consist of not fewer than three presbyteries within a specific geographic region” (*The Book of Order*, G-3.0401).

Teaching elder: see “Minister of Word and Sacrament”.

World Communion of Reformed Churches (WCRC): a global fellowship founded in 2010 with the merger of the World Alliance of Reformed Churches and the Reformed Ecumenical Council consisting of 233 member churches in 110 countries representing 100 million Christians from the Reformed, Presbyterian, United, Uniting, Congregational, and Waldensian theological traditions. The WCRC secretariat’s headquarters is in Hanover, Germany, and is governed by a General Council that meets every seven years, and between General Councils is governed by an Executive Committee.

World Council of Churches (WCC): a global fellowship founded in 1948 consisting of 350 member communions in 110 countries representing over 500 million Christians worldwide. The Episcopal Church and the Presbyterian Church (U.S.A.) are founding members of the WCC. The WCC secretariat’s headquarters is in Geneva, Switzerland and is governed by an Assembly that meets every seven years, and between Assemblies is governed by a Central Committee.

*From the Glossary section of *The One Body Of Christ: Ministry In Service To The Church and The World*, Roman Catholic–Reformed Dialogue of the United States, Round Eight: 2012-2017. pp. 4-5.

EPISCOPAL GLOSSARY

+Anglican Communion: churches in communion with the See of Canterbury throughout the world. Member churches exercise jurisdictional independence but share a common heritage concerning Anglican identity and commitment to scripture, tradition, and reason as sources of authority. The Episcopal Church is the embodiment of the Anglican Communion in the USA and several other countries.

+Anglicanism: this way of life is the system of doctrine, and approach to polity of Christians in communion with the See of Canterbury (the bishop/diocese that is the ecclesiastical center for England and eventually all of the Anglican Communion). The term derives from the word which, in a variety of forms, refers to the people of the British Isles, and especially the English.

****Archdeacon:** a clergy person with a defined administrative authority delegated by the diocesan bishop.

#Bishop: one of the three orders of ordained ministers in the church, bishops are charged with the apostolic work of leading, supervising, and uniting the church. They stand in the historic succession, maintaining continuity with the ministry of the early Church and between Christian communities today. Bishops serve as chief pastors of the church, exercising a ministry of oversight and supervision. They are consecrated bishops for life. Since the bishop's ministry is a ministry of oversight, the term "episcopal" (derived from the Greek *episcopos*, "overseer") is applied to matters pertaining to bishops. An "episcopal" church is a church governed by bishops, and "episcopal" services are led by bishops.

****Bishop-Assistant:** a bishop, ordinarily a full-time member of the diocesan staff, who is appointed rather than elected and assists in carrying out the episcopal ministry of the diocese.

****Bishop-Assisting:** in common usage, a bishop who aides the diocese by providing additional episcopal services on a temporary basis. Appointed by, and serves at the pleasure of, the diocesan bishop, or the Standing Committee if there is no bishop.

****Bishop Coadjutor:** the elected bishop, with the right of succession upon the resignation of the diocesan bishop, who serves with the diocesan bishop.

****Bishop, Diocesan:** also known as the Ordinary of a diocese. A diocesan bishop, as distinct from a suffragan, assistant, or coadjutor bishop. The term apparently springs from the understanding of "ordinary jurisdiction" which is held in canon law to be the jurisdiction "permanently and irremovably annexed to" the office of bishop. By canon, a bishop may not resign jurisdiction without the consent of the House of Bishops. A bishop must resign from all jurisdiction at the age of seventy-two.

****Bishop, Presiding:** Chief Pastor and Primate of the Episcopal Church.

****Bishop Provisional:** if a diocesan bishop resigns with no bishop coadjutor (who has the right of succession) a diocese may call a bishop provisional who serves as the bishop, with full authority, for an interim period of up to three years, until the consecration of a new diocesan bishop.

****Bishop Suffragan:** a bishop who does not automatically succeed a diocesan bishop. Elected by the diocese to serve indefinitely at the direction of the diocesan bishop.

+**The Book of Common Prayer:** official book of worship of The Episcopal Church. The BCP provides liturgical forms, prayers, and instructions so that all members and orders of The Episcopal Church may appropriately share in common worship. Anglican liturgical piety has been rooted in the Prayer Book tradition since the publication of the first English Prayer Book in 1549. The current and defining edition of *The Book of Common Prayer* for The Episcopal Church was ratified in 1979.

****The Book of Occasional Services:** book of optional services and texts prepared by the Standing Commission on Liturgy and Music.

****Canon:** the word has several different meanings in the church.

1) The canon of scripture; 2) Church law; 3) as an ecclesiastical title, a canon may be a member of the clergy or laity on the staff of a cathedral, diocese or other institution, 4) in liturgy, the fixed portion of the Great Thanksgiving.

****Canon to the Ordinary:** clergy or lay person who serves as assistant to the diocesan bishop.

****Canonical Residence:** clergy serving under the jurisdiction of the ecclesiastical authority of a diocese are canonically resident in that diocese. Clergy may move from jurisdiction to jurisdiction pursuant to canonical procedures.

Church: the one holy catholic apostolic church in every time and in every place. Depending on context, may also refer corporately to an ecclesial communion/denomination, e.g. The Episcopal Church, the Presbyterian Church (U.S.A.).

Churches: fellowship of ecclesial communions/denominations, e.g. Churches Uniting in Christ, World Council of Churches.

church (lowercase "c"): the local expression of an ecclesial communion/denomination, i.e. congregation, parish.

Churches Uniting in Christ: a covenant relationship among eleven Christian Communion--mainline American denominations (including both predominantly white and predominantly black churches), and was inaugurated on January 20, 2002 in Memphis, Tennessee on the balcony of the Lorraine Motel. It is the successor organization to the Consultation on Church Union.⁹

****Commission on Ministry (COM):** pursuant to Title III, Canon 1, each diocese is required to establish a COM to assist the bishop in determining the present and future needs for ministry in the diocese.

Consultation on Church Union (COCU): was an effort on the part of several ecclesial bodies towards church unity in the United States, that began in 1962 and in 2002, it became Churches Uniting in Christ (CUIC).

⁹ https://en.wikipedia.org/wiki/Churches_Uniting_in_Christ

Constitution and Canons of The Episcopal Church: the Constitution and Canons is the official set of governing rules for The Episcopal Church's bodies (*General Convention: House of Bishops and House of Deputies*). *The Book of Common Prayer (BCP)* is a part of the *Constitution and Canons of the Episcopal Church*.

****Curate:** typically refers to an assisting priest in a parish.

****Cure:** the pastoral and geographical responsibility and charge of a member of the clergy.

****Deacon:** one of three offices to which people can be ordained in The Episcopal Church, along with priests and bishops. The deacon's vocation lies in serving—especially the weak, the poor, the sick, the lonely—and in interpreting to the church the needs and hopes of the world. The sign of the office of deacon is a stole worn over the left shoulder and fastened under the right arm. In the Eucharist, deacons read the gospel, lead the Prayers of the People, introduce the confession, prepare the altar, assist with the distribution of the bread and wine, perform the ablutions, and dismiss the people.

****Diocese:** a geographical area that serves as the primary unit of organization in The Episcopal Church. A bishop and a legislative body—a convention or council—oversee each diocese.

****Diocesan Convention:** annual meeting of lay and clerical representatives from the congregations of a diocese to elect members of diocesan committees and deputies to General Convention, make decisions about diocesan policy, conduct other diocesan business (e.g., budget, program) and from time to time, elect a bishop for the diocese.

****Diocesan Transition Minister:** the clergy or lay member of the diocesan staff responsible for assisting the bishop, worshipping communities and individuals in transition.

Ecclesial body: a religious fellowship whose congregations are unified in their observance to its beliefs and traditions.

****Ecclesiastical Authority:** the responsible individual or body in a church institution. In a diocese, this authority rests with the diocesan bishop. Should the episcopate be vacant or the bishop be incapacitated, the responsibility falls upon the Standing Committee or other bishop.

The Episcopal Church: a Christian ecclesial body made up of 111 dioceses or convocations in the United States and seventeen countries; The Episcopal Church is a member of the worldwide Anglican Communion.

****Episcopal Church Center:** the churchwide ministries office of The Episcopal Church housing the office of the Presiding Bishop, his or her staff, and other church-related offices. Located in New York City.

****Executive Council of the Episcopal Church:** the national body that administers the program and policies adopted by the General Convention.

Ecumenical congregations: a congregation comprising of at least two or more ecclesial bodies.

Episcopal/episcopal: Episcopal refers to being of The Episcopal Church; episcopal is a term referring to bishop, from the Greek *episkopos*, meaning “overseer.” As above, an “episcopal” church is a church governed by bishops, and “episcopal” services are led by bishops.

Episcopal Presbyterian Agreement of 2008: the Agreement between The Episcopal Church and the Presbyterian Church (U.S.A.) was approved by the 218th General Assembly (2008) and ratified by presbyteries in 2009. The 76th General Convention of The Episcopal Church approved the Agreement in 2009. Both churches authorized another round of dialogue to continue to address theological and missional issues.

****General Convention:** the national legislative body of The Episcopal Church. It consists of a House of Bishops and a House of Deputies (four lay persons and four clergy persons from each diocese). Convention meets every three years.

****House of Bishops:** part of the two-house legislature of General Convention. All diocesan, suffragan, coadjutor, assistant, and most resigned and retired bishops are members of this body, which also meets periodically between General Conventions.

****The Hymnal 1982:** the collection of hymn texts, tunes, and service music authorized for use in The Episcopal Church. Also widely used: *Lift Every Voice and Sing II (LEVAS)*; and *Wonder, Love and Praise*.

Institution: occurring in a service of Celebration of a New Ministry, a bishop shares a letter of institution conferring the responsibilities of a priest in charge of a parish.

****Office for Transition Ministry:** a church-wide office that maintains a database of Episcopal and other clergy and lay professionals in Communion with The Episcopal Church, and the worshipping communities of The Episcopal Church. OTM has a website that allows clergy and lay leaders to search for worshipping communities that are themselves in search, using each other’s gifts, skills and experiences to identify possible opportunities for ministry together in order to assist the church to live into God’s mission in the world.

****Pastor** (as used in The Episcopal Church): term for a member of the clergy. It evokes one aspect of the priestly role, which is that of pastoral ministry: caring and protective responsibility for the sick, the grieving, the needy, and those in pain. It is a term especially appropriate for bishops, since they are ordained to “feed and tend the flock of Christ,” who is the Good Shepherd. (It does not normally mean a clergy person in charge of a parish as in the ELCA.) The laity shares in the pastoral role of the clergy, and a growing number of parishes have lay pastoral care teams.

+Priest or presbyter: from the Greek *presbyteros*, “elder.” In the NT, “presbyter” indicates a leader of the church. The English word “priest” is derived from “presbyter,” and used as a synonym for presbyter. After the Reformation, some churches began to use the term “presbyter” for the minister who preaches the word and administers the sacraments. The Anglican Church used the term “priest” for this order of ministry. The 1979 BCP, and thus The Episcopal Church, uses both terms. For example, directions for the Ordination of a Priest require that “at least two presbyters must be present.” The Catechism notes that “the ministry of a priest or presbyter” is “to represent Christ and his Church, particularly as pastor to the people; to share with the bishop in the overseeing of the Church; to proclaim the gospel; to administer the sacraments; and to bless and declare pardon in the name of God.”

****Priest, related terms:**

- **Priest-in-Charge:** practices vary widely among dioceses. In a parish without a rector, the priest-in-charge generally contracts with the vestry, in consultation with the bishop, to perform many of the functions of a rector.
 - **Rector:** elected by the vestry of a parish in consultation with the bishop and serves as the leader of the parish with respect to its spiritual life and mission. In charge of liturgy, music, education, outreach, and pastoral care, the rector has full use of the parish property to carry out his or her office, hires and supervises lay and clerical staff, and is generally entitled to preside at all vestry and parish meetings.
 - **Vicar:** the title applies to the priest-in-charge of a mission congregation, serving at the pleasure of and representing the bishop.
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****Primate:** the chief bishop in an Anglican Province is called a primate. The term relates to primacy, which in ecclesiastical terms is the status of being first, or presiding, among other bishops.

****Province:** 1) an internal division of an autonomous national church of the Anglican Communion. There are nine provinces in The Episcopal Church, including overseas jurisdictions; 2) An autonomous national church member of the Anglican Communion.

Sacrament: from the Catechism of the 1979 BCP: an outward and visible sign of an inward and spiritual grace, given by Christ as sure and certain means by which we receive that grace. In The Episcopal Church there are two great sacraments: Holy Baptism and the Holy Eucharist. There are five sacramental rites: confirmation, ordination, holy matrimony, reconciliation of a penitent, and unction.

****Standing Committee:** a body that shares the ecclesiastical authority of the diocese with the bishop in certain defined areas (e.g., clergy discipline, property of parishes, ordination). In the absence of a bishop it sometimes becomes the sole ecclesiastical authority. Its members are elected by the diocesan convention. It also serves as the bishop's council of advice.

+Vestry: the vestry is the legal representative of an Episcopal parish with regard to all matters pertaining to its corporate property. The number of vestry members and the term of office varies from parish to parish. Vestry members are usually elected at the annual parish meeting. The presiding officer of the vestry is the rector.

+Warden: officers of a parish. Two wardens are typically selected to serve with members of the vestry. The wardens are generally ranked "senior" and "junior." The senior warden is usually the primary elected lay leader of the congregation, and serves as a principal liaison between the parish and the rector. The junior warden is often given responsibility for the upkeep of the parish buildings and grounds.

+Glossary definitions used or adapted from "*An Episcopal Dictionary of the Church, A User Friendly Reference for Episcopalians*," Church Publishing, New York, 2000, Don S. Armentrout and Robert Boak Slocum, editors.

**Glossary definitions used or adapted from the Episcopal Glossary of "Principles for the Orderly Exchange of Clergy between the Episcopal Church and the Moravian Church in America, Northern and Southern Provinces" from 2009/2010.

Proposal for Exchangeability of the Diaconate:
The Episcopal Church and the Evangelical Lutheran Church in America
Endorsed by the Lutheran Episcopal Coordinating Committee
January 11, 2023

Proposal: An interpretation of *Called to Common Mission* (2000),¹ hereafter “CCM,” in light of the ELCA’s institution of an ordained diaconate (ELCA Churchwide Assembly action, August 2019):

- 1) Based on CCM ¶15 and ¶21, The Episcopal Church (TEC) and the Evangelical Lutheran Church in America (ELCA) mutually recognize each other’s order of deacons as authentic.
- 2) Based on CCM ¶14, the ELCA continues to acknowledge the authenticity of deacons in TEC. Based on CCM ¶15, TEC now acknowledges the authenticity of deacons/rostered ministers of Word and Service of the ELCA and its predecessor bodies.
- 3) Based on CCM ¶22, TEC and the ELCA acknowledge that each other’s deacons may validly serve in each other’s liturgies. TEC and the ELCA mutually recognize each other’s deacons as interchangeable for occasional ministry or extended service in counterpart ministries and joint ministry settings, subject to the approval of their respective bishops. We propose that the full communion *Orderly Exchange* guidelines for pastors and priests² be amended to include exchangeability of deacons.
- 4) Based on CCM ¶9, TEC and the ELCA renew their pledge to jointly undertake “continuing exploration, renewal, and reform”³ for the purpose of deepening the opportunities for diaconal word and service in both communions and in our full communion relationship.

Commentary:

Historical Background

In 2001, TEC and the ELCA acknowledged the authenticity of each other’s episcopal and presbyteral orders through their full communion agreement, *Called to Common Mission*.⁴ An impediment remained to full exchangeability for one group: Episcopal deacons and their Lutheran diaconal counterparts as then rostered. The Lutheran Episcopal Coordinating Committee addressed the exchangeability of TEC deacons and the ELCA rosters of Word and Service several times after the adoption of CCM but was unable to reach a solution. Since one group (TEC) was viewed as ordained and the other (ELCA) as consecrated or commissioned lay ministers, the gap was too great to bridge.

The ELCA 2016 Churchwide Assembly changed the church’s polity and ecclesiology by unifying its three rostered ministries of word and service⁵ into one roster of deacons, and the ELCA 2019

¹ Evangelical Lutheran Church in America and Episcopal Church USA, *Called to Common Mission* (2000), download.elca.org/ELCA%20Resource%20Repository/Called_To_Common_Mission.pdf.

² *The Orderly Exchange of Pastors and Priests Under Called to Common Mission: Principles and Guidelines*, http://lutheran-episcopal.org/documents/orderly_exchange.pdf

³ CCM ¶9.

⁴ CCM ¶14, 15, 21.

⁵ Deaconesses, Associates in Ministry and Diaconal Ministers.

Churchwide Assembly confirmed that the entrance rite for this unified order would be ordination. Many ELCA deacons received from the former rosters of Word and Service were consecrated or commissioned with a laying-on of hands by a bishop; some were not, under former liturgical practices. Recognizing the diaconal character of all the former rosters of Word and Service in the ELCA and its predecessor bodies, the ELCA received them into the ELCA's roster of ordained deacons. The ELCA's ordination rite for deacons now includes a laying-on of hands by a bishop. The ELCA's actions have now brought the ELCA's diaconate into congruence with TEC's diaconate. The theological impediments to full exchangeability of TEC and ELCA deacons have now been removed.

Under our full communion partnership, TEC is now invited to recognize the authenticity of all these ELCA deacons in the future. There is historical precedent in the broader Anglican Communion and in TEC for this reception: both the recommendations of the Lambeth Conference in 1968⁶ and the canonical resolutions of the Episcopal Church General Convention in 1970⁷ provided for the reception of (consecrated) deaconesses into the order of deacons. Neither implemented additional requirements for deaconesses to be made deacons or distinguished between those consecrated deaconesses who were "grandmothered in" as deacons and those ordained after the new canon's passage.

Bringing the Diaconate Into Full Communion

Building upon the full communion agreement and over 20 years of living into common mission together, this proposal recognizes and celebrates that our two churches now hold a common theology and ecclesiology for recognition and exchangeability of ELCA and TEC deacons.

TEC and the ELCA now hold a common vision of the diaconate. Both envision their deacons as equipping the *diakonia* (service rooted in the word of God) of the church as a whole; this *diakonia* of all believers⁸ is one of the primary goals of CCM. TEC and the ELCA jointly affirmed in CCM that "all members of Christ's church are commissioned for ministry through baptism."⁹ Both churches' theology of the diaconate is grounded in the sacrament of baptism. The diaconate is the order to which the church confers responsibility for reminding the people of God that a call to active *diakonia* constitutes a Christian baptismal identity. "The deacon symbolizes the service of Jesus Christ to which we are all called in baptism," declares a paper presented in 2017 to the ELCA Entrance Rite Discernment Group.¹⁰ Deacons and laypeople together serve roles of worship leadership, providing yet another opportunity to highlight the

⁶ *The Lambeth Conference 1968: Resolutions and Reports* (SPCK and Seabury Press, 1968), 39, 105-106.

⁷ *Journal of the General Convention of the Protestant Episcopal Church in the United States of America: Otherwise Known as the Episcopal Church, Held in Houston, Texas, From October Eleventh to Twenty-Second, Inclusive, in the Year of Our Lord 1970, With Constitution and Canons* (New York: 1970), 249, 270-71, 769-70.

⁸ See Craig L. Nesson, "A Lutheran Theology for *Diakonia* in North American Contexts," in Godwin Ampony, et al., *International Handbook on Ecumenical Diakonia* (Oxford: Regnum Books, 2021), 283-4.

⁹ CCM ¶16.

¹⁰ Gordon Lathrop, "Diaconal Ministry: The Entrance Rite Question, Reflections From a Consideration of Symbolic Meaning and Ritual Practice," bit.ly/3GDZm5x

intersections of the church and the world. Both groups have experienced a maturing of diaconal identity and an increase in diaconal vocations.

The ELCA and TEC have together come to a place where they were called to be over two decades ago, when they entered into full communion. Each church has evolved in its understanding and practice of the diaconate, and now we have come to convergence in this ministry. In Canada the Waterloo Declaration of 2001, which established full communion relations between the Anglican Church of Canada (ACC) and the Evangelical Lutheran Church in Canada (ELCIC), similarly commits those two churches “to work towards a common understanding of diaconal ministry.”¹¹ With the final action in 2022 affirming the “Memorandum of Mutual Recognition of Relations of Full Communion” among the ACC, the ELCIC, the ELCA and TEC,¹² these four churches have further committed themselves to “establish policies and procedures to facilitate exchange of ministry” across the continental border of Canada and the U.S., including the possibility of the exchange of deacons.¹³

Under the U.S. full communion agreement, *Called to Common Mission*, we hereby propose that TEC and ELCA approve each other’s deacons to serve liturgically and to serve under call in each other’s parishes and other ministry contexts under the same principles of *Orderly Exchange* that govern pastors/priests:

This orderly exchange of [deacons] is for the sake of participation in the mission of God and can be an important sign of our unity in Christ. Exchangeability, as part of common ecumenical commitment to collaborate as members of the one body of Christ, can enhance shared ministry and mission by encouraging more flexible, responsive and effective placement of [deacons]. Thus, orderly exchange encourages those in our churches responsible for ministerial placement to invite the service of [deacons] available in other churches and make use of their gifts; it encourages [deacons] in each church to respond to such invitations or, where appropriate, to express their openness to serve in another church.¹⁴

“As our churches live in full communion,” states *Called to Common Mission*, “our ordained ministries will still be regulated by the constitutional framework of each church.”¹⁵ Nothing in this proposal would require any change in the two churches’ differing polities around the ordination of priests/pastors. EC may continue the practice of ordination to the transitional

¹¹ Anglican Church of Canada, “Called to Full Communion (The Waterloo Declaration),” 2001, www.anglicancommunion.org/media/102184/waterloo_declaration.pdf

¹² The Episcopal Church, “Memorandum of Mutual Recognition of Relations of Full Communion,” April 1, 2022, www.episcopalchurch.org/eir/memorandum-of-mutual-recognition-of-relations-of-full-communion/

¹³ A process for enabling the transferability of deacons between the Anglican Church of Canada and the Evangelical Lutheran Church in Canada has not yet been formally pursued.

¹⁴ This quote is from the 2021 proposed revision of *Principles for the Orderly Exchange of Pastors and Priests*.

¹⁵ CCM ¶18.

diaconate prior to ordination to the priesthood, whereas the ELCA may continue its practice of direct ordination of pastors into the office of Word and Sacrament.

Called to Common Mission states, “both churches acknowledge that the diaconate, including its place within the threefold ministerial office and its relationship with all other ministries, is in need of continuing exploration, renewal, and reform, which they pledge themselves to undertake in consultation with one another.”¹⁶ Exchangeability of calls will deepen the theology and practice of *diakonia* in both churches and may facilitate a deepening dialogue on *diakonia* with other ecumenical partners’ expressions of diaconate as well.

This recognition and declaration of exchangeability will provide the following opportunities:

- a) The preparation of TEC and ELCA deacons will be enhanced by mutual sharing of competencies, educational resources and processes for formation. Well-established educational institutions in both traditions offer excellent programs and certifications specifically designed for diaconal ministry.
- b) The ELCA and TEC will want to coordinate their respective guidelines for call and deployment. Diaconal exchangeability under this agreement will be enhanced by careful attention to:
 - Assessment of equivalencies in areas of specialization, where applicable.
 - Training in the liturgical practices of the hosting church.
 - Addressing divergent policies and practices regarding compensation.
- c) Given that TEC and the ELCA have different liturgical roles for deacons, “a spirit of graciousness and commonality,”¹⁷ pastoral sensitivity and clarity of expectation are encouraged, especially in planning ecumenical events.
- d) The deacon should be rooted in the community of worship in order to live into the fullness of their diaconal identity as those ordained to ensure that the people of God fulfill their own diaconal responsibilities.

Our churches are called to common mission, to work together to reveal our unity in Christ,¹⁸ linking the church and the world. We are part of a global and ecumenical movement of the Spirit that is opening the ears of the church to the desperate cries of the world and pushing us beyond our Sunday-morning gatherings back out into the world in cross-shaped *diakonia*. As an order rooted in mission, a shared diaconate will advance CCM’s witness. Coordinating our expressions of *diakonia* will be a gift to the whole church and will offer a more coherent witness to the world. Collaborative diaconal ministries focused on the world’s needs will serve both churches’ outreach in the post-pandemic evangelism environment.

As our shared understanding of the diaconate continues to evolve, the role of deacons is becoming more clearly focused not only on service among the poor, the weak, the sick and the

¹⁶ CCM ¶9.

¹⁷ *Guidelines & Worship Resources for the Celebration of Full Communion: Lutheran – Episcopal* (2001), bit.ly/3ivvDUE

¹⁸ The Episcopal Church, *The Book of Common Prayer* (1979), Eucharistic Prayer D, p. 375.

lonely but also on justice and advocacy on their behalf; not only on interpreting the needs, concerns and hopes of the world but also on teaching and equipping others for ministry; and not only working under the authority of the bishop but also providing leadership within the councils of church and society alike. This is our common diaconal mission: for the Spirit to use us as participants in and means for God's mission of hope, healing and reconciliation in God's beloved world.

Roster of the Diaconate Implementation Team (2021-2022)

Deacon Mitzi Budde, Chair (ELCA deacon, member of the Lutheran-Episcopal Coordinating Committee)

The Rev. Deacon Maylanne Maybee (Anglican Church of Canada deacon, Joint Anglican-Lutheran Commission representative)

The Rev. Deacon Lori Mills-Curran (Episcopal deacon, former executive director of the Association for Episcopal Deacons)

Deacon John Weit (ELCA deacon, ELCA executive for worship)

The Rev. William Gafkjen (ELCA bishop, Indiana-Kentucky Synod; chair of the ELCA Word and Service task force)

The Rt. Rev. Jeffrey D. Lee (Episcopal bishop, Diocese of Milwaukee) (until Oct. 31, 2022)

1 **A Gift to the World: Co-Laborers for the Healing of Brokenness**
2 The Episcopal Church and The United Methodist Church
3 A Proposal for Full Communion
4 Edits to October 2018
5

6 *Preamble*
7

8 In the fractured human community there is a great need for the realization of the unity among the
9 followers of Christ Jesus. This proposal for full communion between The Episcopal Church and
10 The United Methodist Church is an effort to bring our churches into closer partnership in the
11 mission and witness to the love of God and thus labor together for the healing of divisions
12 among Christians and for the well-being of all. The vision of Revelation 22 is of the tree of life
13 planted on both sides of a river “and the leaves of the tree are for the healing of the nations.”
14 (Revelation 22:2) Faithful to Jesus’ prayer that his disciples be one so that the world may believe
15 (John 17: 20-23), may this proposal be an expression of God’s will for the churches.
16

17 *1. Introduction: The Nature of the Communion We Seek*
18

19 Since 2002, The Episcopal Church and The United Methodist Church have been engaged in
20 bilateral dialogue, setting full communion as the goal. We understand the relationship we seek as
21 follows:
22

23 Full communion is understood as a relationship between two distinct
24 ecclesiastical bodies in which each maintains its own autonomy while recognizing
25 the catholicity and apostolicity of the other, and believing the other to hold the
26 essentials of the Christian faith. In such a relationship, communicant members of
27 each would be able freely to communicate at the altar of the other, and ordained
28 ministers may officiate sacramentally in either church. Specifically, this includes
29 transferability of members, mutual recognition and interchangeability of
30 ministries, mutual enrichment by one another’s traditions of hymnody and
31 patterns of liturgy, freedom to participate in each other’s ordinations and
32 installations of clergy, including bishops, and structures for consultation to
33 express, strengthen, and enable our common life, witness, and service, to the
34 glory of God and the salvation of the world.
35

36 We seek to draw closer in mission and ministry, grounded in sufficient agreement in the
37 essentials of Christian faith and order and assisted by interchangeability of ordained ministries.
38 This full communion agreement is not proposing a merger of our churches. Yet we seek to live
39 into the vision given to us by Jesus, who prayed that we may all be one (John 17:21), and strive
40 for the day when we may be drawn into more visible unity for the sake of mission and ministry,
41 “so that the world may believe.” We see this relationship of full communion as a step on the
42 journey, and trust in the Holy Spirit to continue to guide us in more visible expressions of unity.
43 We are blessed in that neither of our churches, or their predecessor bodies, have officially
44 condemned one another, nor have they formally called into question the faith, the ministerial
45 orders, or the sacraments of the other church.
46

47 2. *Background: Anglican-Methodist Dialogues*

48
49 The Episcopal Church-United Methodist Church bilateral dialogue began in 2002. In 2006, The
50 United Methodist Church and The Episcopal Church entered into a relationship of Interim
51 Eucharistic Sharing, a step on the way towards full communion that allows for clergy of the two
52 churches to share in the celebration of the Lord's Supper under prescribed guidelines.¹ In 2010, it
53 issued a summary of its theological work, *A Theological Foundation for Full Communion*
54 *Between The Episcopal Church and The United Methodist Church*. Both of these documents
55 have been sent to bishops and deputies to General Convention in The Episcopal Church and to
56 the Council of Bishops of The United Methodist Church, and should be read in conjunction with
57 this proposal. They are available online at <https://www.episcopalarchives.org/sceir/methodist>.

58
59 The first round Dialogue Committee noted in *A Theological Foundation for Full Communion*
60 that it sees no church dividing issues between the two churches.

61
62 The second round of bilateral dialogue commenced in 2015 to prepare the way for a full
63 communion proposal to be presented to the General Convention of The Episcopal Church and
64 the General Conference of The United Methodist Church, and to assist members in both
65 churches to understand the closer relationship and its relevance to the lives of persons in local
66 communities in which it will be lived out.

67
68 This proposal for full communion is the fruit of over fifty years of formal dialogues between our
69 two churches. In the 1950s, there were substantive conversations between the (then) Methodist
70 Church and the (then) Protestant Episcopal Church. However, these bilateral conversations were
71 set aside in favor of both churches' membership in the Consultation on Church Union (COCU).
72 For nearly forty years, The Episcopal Church and The United Methodist Church related to one
73 another by means of our participation in COCU. Following COCU's reconstitution as Churches
74 Uniting in Christ (CUIC) in 1999, The Episcopal Church and The United Methodist Church each
75 decided in 2000 to commence the first direct bilateral dialogue with one another in nearly fifty
76 years.

77
78 The United Methodist-Episcopal dialogue also benefits from the fact that we are members,
79 through the Anglican Communion and the World Methodist Council, of an international
80 dialogue, and are informed by the fruits of those conversations. The first round of an
81 international dialogue mutually sponsored by the World Methodist Council and the Anglican
82 Communion produced a theological statement, *Sharing in the Apostolic Communion*, issued in
83 1996. This landmark document noted that Anglicans and Methodists shared the "core doctrine"
84 of the Christian faith, and need "no further doctrinal assurances" from one another.² Both church
85 families inaugurated a second round of conversations in 2007, the Anglican Methodist
86 International Consultation on Unity and Mission (AMICUM), and have issued a report, *Into All*
87 *the World, Being and Becoming Apostolic Churches*.

88

¹ See Resolution A055 from the 2006 General Convention and Resolution 81456-IC-NonDis of the 2008 United Methodist General Conference.

² See *Sharing in the Apostolic Communion*, particularly ¶ 15-17.

89 3. *Relationship with Historically African American Methodist Churches*

90
91 We are cognizant of the fact that The United Methodist Church is one of several expressions of
92 Methodism. Our two churches have been in dialogue with historically African American
93 Methodist churches for nearly forty years. The African Methodist Episcopal Church (AME),
94 African Methodist Episcopal Church Zion (AME Zion), and Christian Methodist Episcopal
95 Church (CME) have been constituent members of COCU and CUIC along with The Episcopal
96 Church and The United Methodist Church. Through the Pan Methodist Commission, The United
97 Methodist Church, AME, AME Zion, CME, African Union Methodist Protestant Church
98 (AUMP), and Union American Methodist Episcopal Church (UAME) worked to formalize a full
99 communion agreement among these churches in 2012. The United Methodist Church and The
100 Episcopal Church have consulted with the AME, AME Zion, and CME churches (in 2006, 2008,
101 and 2009).

102
103 The United Methodist-Episcopal dialogue laments that church divisions in the US have reflected
104 racial and socioeconomic divisions. The Dialogue Committees have been adamant that
105 conversations between Anglicans and Methodists must address racism as a church dividing issue.
106 In addition to our common forebears John and Charles Wesley, we also have common forebears
107 in Richard Allen and Absalom Jones, both members of St. George’s Methodist Episcopal Church
108 in Philadelphia. Due to policies of racial exclusion, Richard Allen would go on to found what
109 would become the African Methodist Episcopal Church, while Absalom Jones would become the
110 first African American priest ordained in The Episcopal Church. We recognize the lasting sin of
111 racism in our society and our churches, and affirm the need for ongoing repentance, truth telling,
112 and work for racial justice and healing.

113
114 4. *Foundational Principles*

115
116 We seek the greater unity between our two churches because we believe this is a mandate
117 grounded in Scripture. Jesus calls us into unity for the sake of mission and ministry, so that the
118 world may believe:

119
120 I ask not only on behalf of these, but also on behalf of those who
121 will believe in me through their word, that they may all be one (John
122 17:20-21a).

123
124 Our unity is also grounded in our common baptism:

125
126 There is one body and one Spirit, just as you were called to the one
127 hope of your calling, one Lord, one faith, one baptism, one God and
128 Father of all, who is above all and through all and in all (Ephesians
129 4:4-6).

130
131 The United Methodist Church engages other Christian churches on the basis of its constitutional
132 affirmation that “The church of Jesus Christ exists in and for the world, and its very dividedness
133 is a hindrance to its mission in that world” (2016 *Book of Discipline*, Constitution, Preamble).
134 The United Methodist Church understands itself “to be part of Christ’s universal church when by

135 adoration, proclamation, and service we become conformed to Christ. We are initiated and
136 incorporated into this community of faith by baptism” (2016 *Discipline*, ¶102, page 49).
137 Therefore, The United Methodist Church “believes that the Lord of the church is calling
138 Christians everywhere to strive toward unity; and therefore it will pray, seek, and work for unity
139 at all levels of church life” (2016 *Discipline*, Constitution, Article VI, ¶6).

140
141 The United Methodist Church seeks formal full communion relationships with other Christian
142 churches based on the following: a mutual affirmation of one another’s membership in the one,
143 holy, catholic and apostolic church “described in the Holy Scriptures and confessed in the
144 church’s historic creeds,” recognition of the authenticity of one another’s sacraments and
145 Christian ministry, and a recognition of the validity of each other’s offices of ministry (2016
146 *Discipline*, ¶431.1). These relationships commit us to active sharing in mission and ministry as a
147 visible witness to Christian unity.

148
149 For over a century, The Episcopal Church has engaged in dialogue with other churches on the
150 basis of the Chicago-Lambeth Quadrilateral, taking agreement on these foundation principles as
151 the essentials for sharing in mission and ministry with other Christian communions:

152
153 The Holy Scriptures of the Old and New Testaments, as “containing all things necessary
154 to salvation,” and as being the rule and ultimate standard of faith.

155
156 The Apostles’ Creed, as the Baptismal Symbol; and the Nicene Creed, as the sufficient
157 statement of the Christian faith.

158
159 The two Sacraments ordained by Christ Himself — Baptism and the Supper of the Lord
160 — ministered with unfailing use of Christ’s Words of Institution, and of the elements
161 ordained by Him.

162
163 The Historic Episcopate, locally adapted in the methods of its administration to the
164 varying needs of the nations and peoples called of God into Unity.

165
166 It is important to note the term used in the Chicago-Lambeth Quadrilateral is “historic
167 episcopate.” In its ecumenical dialogues, The Episcopal Church has made important
168 clarifications regarding the historic episcopate, historic succession, and apostolic succession.
169 This term is referenced in the Chicago-Lambeth Quadrilateral as “the historic episcopate,” with
170 the two terms “historic episcopate” and “historic succession” understood synonymously.

171
172 In addition, a major ecumenical breakthrough has been acknowledging the differences between
173 “apostolic succession” and “historic episcopate.” We understand “apostolic succession” to be
174 succession in the apostolic faith—that is, to believe, preach, and teach the faith that the apostles’
175 held. Some churches have retained the apostolic succession of the faith proclaimed by the
176 apostles as well as bishops in historic succession; others have not. The United Methodist Church
177 and The Episcopal Church have affirmed the relationship between episcopacy and apostolic
178 succession as described in the seminal ecumenical document *Baptism, Eucharist, and Ministry*
179 (1982):

180
181 The primary manifestation of apostolic succession is to be found in the apostolic tradition of
182 the Church as a whole...The orderly transmission of the ordained ministry is therefore a
183 powerful expression of the continuity of the Church throughout history; it also underlines the
184 calling of the ordained minister as guardian of the faith... Under the particular historical
185 circumstances of the growing Church in the early centuries, the succession of bishops
186 became one of the ways, together with the transmission of the Gospel and the life of the
187 community, in which the apostolic tradition of the Church was expressed. This succession
188 was understood as serving, symbolizing and guarding the continuity of the apostolic faith and
189 communion.⁴

190
191 Both churches affirm the historic episcopate, in the language of the *Baptism, Eucharist and*
192 *Ministry* statement, as a “sign, but not a guarantee, of the catholicity, unity, and continuity of the
193 church;” and that the historic episcopate is always in a process of reform in the service of the
194 Gospel.

195 The United Methodist Church provides episcopacy through an “itinerant general superintendency.”
196 The Council of Bishops provides oversight to the spiritual and temporal work of the church and
197 that bishops are elected in regional representative conferences and subject to assignment.

198
199 We declare that we recognize one another as members of the one, holy, catholic and apostolic
200 church in which the Gospel is rightly preached and taught; and that the basic teaching of each
201 respective church is consonant with the Gospel and is sufficiently compatible.

202 Affirmations

203 Both The United Methodist Church and The Episcopal Church affirm
204 common doctrines and practices on the basis of our authoritative historic
205 documents and formularies:

206
207 Our churches proclaim Jesus Christ as Lord and Savior.

208 Our churches worship one God as the divine Trinity of Father, Son,
209 and Holy Spirit, and we baptize those who enter the Christian
210 community in the name of the Father, Son, and Holy Spirit.

211 Our churches affirm the Holy Scriptures as “containing all things
212 necessary for salvation,” and as the primary rule for the life of the
213 church.

214 Our churches affirm and use the Nicene and Apostles’ Creeds as
215 sufficient summaries of the Christian faith.

216 Our churches understand and practice the sacrament of holy baptism
217 as initiation into the life of Christ through the Church.

⁴ *Baptism, Eucharist, and Ministry*, ¶¶ M35 and M36.

218 Our churches understand and practice the sacrament of the Eucharist
219 (the Lord's Supper, Holy Communion) as a means of divine grace
220 that sustains and deepens our faith.

221 Our churches continue to worship in ways that reflect our common
222 liturgical and sacramental roots in our authorized liturgies.

223 Our churches affirm the role of bishops as leaders of the life, work,
224 and mission of the church, as symbols of unity, and as guiding and
225 maintaining the church's apostolic faith and work.

226 Our churches affirm the gifts and ministries of all persons as
227 grounded in the grace given in baptism.

228 Our churches have worked in the last half century to restore the
229 office of deacon as a permanent order for servant ministry in the life
230 of the church.

231 Our churches affirm the need for prayer and holiness of heart and
232 life as ways of growth in the Christian faith.

233 Our churches pursue social action and justice as inherent practices
234 of Christian discipleship.

235 Our churches affirm the unity of the church as the will of Christ for
236 the sake of mission, service and evangelism.

237 Our churches affirm that the scriptures are to be understood today in
238 the light of reasoned reflection on our contemporary experience.

239 From *Theological Foundation for Full Communion*, pp. 14-15.

240 5. *The Ministry of Lay Persons*
241

242 Our churches believe that the ministry of all people is grounded in baptism, where we share in
243 Christ's eternal priesthood. We recognize one another's baptisms into the one, holy, catholic, and
244 apostolic church. In addition, over the years, we have developed a number of lay ministries.
245 From its beginning as a movement in the Church of England, Methodism has recognized the
246 central importance of lay leadership. In The United Methodist Church, every lay person is called
247 by virtue of baptism to participate in the mission of the Church (2016 *Discipline*, ¶¶126, 129).
248 The Church affirms that "the ministry of the laity flows from a commitment to Christ's
249 outreaching love. Lay members of The United Methodist Church are, by history and calling,
250 active advocates of the gospel of Jesus Christ" (2016 *Discipline*, ¶127). Lay leaders serve at
251 congregational, district, and conference levels. Lay persons may be trained and certified as lay
252 servants, lay speakers, lay missionaries, lay ministers and as Deaconesses and Home Missioners.
253

254 The Catechism of The Episcopal Church states that "The ministers of the Church are lay persons,
255 bishops, priests, and deacons" (*Book of Common Prayer*, p.855). Baptism is understood as
256 foundation for the ministry of all the baptized, as the people pray that the newly baptized
257 "Confess the faith of Christ crucified, proclaim his resurrection, and share with us in his eternal

258 priesthood” (*BCP*, p. 308). In the Episcopal Church, persons may be trained and licensed as a
259 Pastoral Leader, Worship Leader, Preacher, Eucharistic Minister, Eucharistic Visitor, Evangelist,
260 and Catechist. The Episcopal Church and The United Methodist Church acknowledge the
261 interchangeability of one another’s lay ministries, always according to the standards and polity of
262 the Book of Discipline and the Constitution and Canons of the Episcopal Church.

263

264 6. *The Ministry of Deacons*

265

266 The Episcopal Church and The United Methodist Church have witnessed a revival of the office
267 of deacon. There are persons ordained to a ministry of Word and Service, serving as icons of the
268 servant ministry of Jesus Christ. As a result of the actions taken by both churches in ¶ 9, we
269 affirm the mutual interchangeability of deacons, always according to the standards and polity of
270 each church. We also note that The Episcopal Church has retained the office of deacon for those
271 persons called to the priesthood, while The United Methodist Church no longer ordains persons
272 called to be elders as deacons.

273

274 7. *The Ministry of Presbyters/Elders*

275

276 Both of our churches ordain persons to the office of presbyter to exercise a ministry of Word and
277 Sacrament. In The Episcopal Church, the terms presbyter and priest are most commonly used. In
278 The United Methodist Church the synonymous term elder is used (though presbyter is used by
279 some member churches of the World Methodist Council). The Episcopal Church speaks of
280 clergy “in good standing,” either canonically resident in a diocese or licensed to preside in a
281 particular diocese. The United Methodist Church speaks of elders “in full connection.” We
282 affirm the mutual interchangeability of priests/presbyters in good standing and elders in full
283 connection, always according to the standards and polity of each church.

284

285 8. *The Ministry of Bishops*

286

287 We acknowledge and recognize that both churches have adapted the episcopacy to particular
288 circumstances of mission, ministry, and witness. Following the American Revolution, The
289 Episcopal Church adapted the office of bishop to its new missional context: bishops were elected
290 by representative bodies (Diocesan Conventions) and exercised oversight in conjunction with
291 clergy and laypersons. After the American Revolution, Methodists also adapted the episcopal
292 office to the missional needs of their ministerial circumstances and settings. Early Methodism
293 adapted the office of bishop as an itinerant general superintendency, and the name of the largest
294 Methodist body incorporated the word: Methodist Episcopal Church, reflecting this choice of
295 episcopal governance. The United Methodist Church includes among its antecedent
296 denominations the Methodist Protestant Church resulting from a merger in 1939. The Methodist
297 Protestant Church incorporated the Methodist episcopacy at that time as it did not have the office
298 of bishop in its structure. In 1968, The United Methodist Church was created through the merger
299 of the Methodist Church with the Evangelical United Brethren Church, which also had bishops,
300 at which time the churches’ episcopacies were brought together into a unified whole.

301

302 In The Episcopal Church and The United Methodist Church, bishops are consecrated by other
303 bishops and ordain presbyters/elders and deacons. They exercise oversight in a specific

304 geographic area—the diocese or annual conference—and in conjunction with clergy and lay
305 persons.

306
307 We affirm the ministry of bishops in The United Methodist Church and The Episcopal Church to
308 be adaptations of the episcopate to the needs and concerns of the post-Revolutionary missional
309 context. We recognize the ministries of our bishops as fully valid and authentic.⁵

310
311 We lament any ways, whether intentionally or unintentionally, explicitly or implicitly, that
312 Episcopalians may have considered the ministerial orders of the United Methodist Church or its
313 predecessor bodies to be lacking God’s grace.

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315 It is our hope and prayer that in this full communion proposal we may heal these divisions, right
316 the sin of separation from the 1780s, and share in these mutual adaptations of the episcopate for
317 the greater unity of the church in mission and ministry.

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319 9. *Actions of Both Churches*

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321 *Action concerning elders and deacons in full connection of The United Methodist Church*

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323 Having affirmed in this proposal the full authenticity of existing ordained ministries in The
324 United Methodist Church, having reached sufficient agreement in faith with the same Church,
325 having declared one another to be members of the one, holy, catholic and apostolic church
326 (A055, 2006 General Convention), and having agreed that the threefold ministry of Bishops,
327 Presbyters, and Deacons in historic succession will be the future pattern of the one ordained
328 ministry shared corporately within the two Churches in full communion, The Episcopal Church
329 authorizes service of United Methodist deacons and elders as permitted under Article VIII of the
330 Constitution, which permits the service of clergy not ordained by bishops authorized to confer
331 holy orders that are “designated as part of the Covenant or Instrument by which full communion
332 was established, shall be eligible to officiate under this Article.” By sharing in the historic
333 episcopate, we will have fulfilled all four elements of the Chicago-Lambeth Quadilateral. The
334 purpose of this action will be to recognize the authenticity of elders and deacons in The United
335 Methodist Church and to permit the full interchangeability and reciprocity of all United
336 Methodist elders in full connection as priests and all United Methodist deacons in full connection
337 as deacons in the Episcopal Church without any further ordination or re-ordination or
338 supplemental ordination whatsoever, subject always to canonically or constitutionally approved
339 invitation.⁶

⁵ *Into All the World*, the 2014 report of the international Anglican-Methodist dialogue, includes an extensive discussion of the distinct exercise of *episcopé* in the Anglican and Methodist traditions (¶¶75-127), concluding that “in light of everything that we have learned about each other...there are no church dividing differences between us in faith, in ordered ministry, in the succession of such ministries, and in the value of episcopacy.... To be plain, only one thing remains for churches in our two traditions in order to manifest our unity in Jesus Christ through the interchangeability of ordained ministry, namely for Methodists and Anglicans to come together under the sign of the historic episcopate, for that represents the larger history of transmission of which Methodist Churches are already a part” (¶¶123-124).

⁶ Authorized through Article VIII of the Constitution, this recognition is based on acceptance of all points of the Chicago-Lambeth Quadilateral, including sharing in the historic episcopate, and is consistent with

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Action concerning priests and deacons of the Episcopal Church

Upon adoption of this agreement by the General Convention of the Episcopal Church and the General Conference of The United Methodist Church, all priests and deacons of the Episcopal Church are granted full interchangeability and reciprocity as elders and deacons, respectively, in The United Methodist Church without any further action, subject always to canonically or constitutionally approved invitation. There are no restrictions requiring a temporary suspension.

The two churches pledge to draw closer together by mutually honoring their respective adaptations of the episcopate according to the following pattern:

Actions concerning bishops of both churches.

To share in our mutual adaptations of the episcopate, to embody our conviction that our ministries of bishops are fully valid and authentic, and to broaden and deepen our ecumenical partnerships, both churches commit to the following actions:

The United Methodist Church pledges that, effective January 1, 2022,⁷ consecrations of United Methodist bishops will include at least three bishops drawn from common full communion partners with The Episcopal Church (the Moravian Church and the Evangelical Lutheran Church in America). One of these three shall be a bishop in the Episcopal Church. These bishops will be present and participate in the laying on of hands.

The Episcopal Church pledges that, effective January 1, 2022, ordinations and consecrations of Episcopal bishops will include at least three bishops drawn from common full communion partners with The United Methodist Church (the Moravian Church and the Evangelical Lutheran Church in America) and with at least one United Methodist bishop present. These bishops will be present and participate in the laying on of hands.

10. *Joint Commission*

To assist in joint planning for mission, both churches will authorize the establishment of a joint commission, fully accountable to the decision-making bodies of the two churches.

This Commission will be charged with planning an appropriate liturgy to celebrate the full communion inaugurated by this agreement. This liturgy will acknowledge the pain of division, call for reconciliation and forgiveness for any sins of the past, and look with hope to celebrate

broader Anglican practice. Furthermore, in 2014, the Church of Ireland recognized Methodist presbyters (elders) as eligible for service as part of a process of sharing in the historic episcopate adopted by the Methodist Church in Ireland, and the Church of England is proposing recognition of Methodist presbyters (elders) as part of sharing in the historic episcopate with the Methodist Church of Great Britain.

⁷ This date assumes an affirmative vote at the 2021 General Convention of The Episcopal Church and 2020 General Conference of The United Methodist Church. It may need to be adjusted to reflect the year of the actual endorsement and acceptance of this proposal by General Convention and General Conference.

378 the common mission and witness to which we commit ourselves.

379

380 Its purpose will also be consultative, to facilitate mutual support and advice as well as common
381 decision making through appropriate channels in fundamental matters that the churches may face
382 together in the future. The joint commission will work with the appropriate boards, committees,
383 commissions, and staff of the two churches concerning such ecumenical, doctrinal, pastoral, and
384 liturgical matters as may arise, always subject to approval by the appropriate decision-making
385 bodies of the two churches.

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387 *11. Other Relationships*

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389 The United Methodist Church and The Episcopal Church agree to cultivate and maintain active
390 partnership and consultation with one another in the promotion of unity with other churches and
391 closer relations with other faith traditions. Ecumenical and interreligious agreements entered into
392 by one church represented in this agreement with another church or religious group shall not be
393 understood to impose or imply any formal relationship with the other.

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395 *12. Conclusion*

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397 We give thanks for the gift of unity that is given us through the love of Christ Jesus. We rejoice
398 that this relationship will empower us to more authentically witness to the gospel.

399

400 Charles Wesley, a priest in the Church of England, and co-leader with his brother John in the
401 Methodist movement in eighteenth-century England, wrote:

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403 Blest be the dear uniting love
404 that will not let us part;
405 our bodies may far off remove,
406 we still are one in heart.

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408 We all are one who him receive,
409 and each with each agree,
410 in him the One, the Truth we live,
411 blest point of unity!

412

413 Partakers of the Savior's grace,
414 the same in mind and heart,
415 nor joy, nor grief, nor time, nor place,
416 nor life, nor death can part.

STANDING COMMISSION ON FORMATION AND MINISTRY DEVELOPMENT

Membership

The Rev. Jess Elfring-Roberts, Chair	Chicago, V	2024
Dr. Katherine Karr-Cornejo, Vice-Chair	Spokane, VIII	2027
Mr. Jack Mandeville, Vice-Chair	Oregon, VIII	2024
The Rev. Canon Kelly Sundberg Seaman, Secretary	New Hampshire, I	2024
The Rt. Rev. Laura Ahrens	Connecticut, I	2024
The Rt. Rev. Diana Akiyama	Oregon, VIII	2027
Mr. Wilfredy Carmona	Dominican Republic, IX	2024
Ms. Leah Dail	North Carolina, IV	2024
Mr. Brian Denton	Alabama, IV	2027
Ms. Sinead Doherty	East Tennessee, IV	2024
The Rev. Yoimel Gonzalez Hernandez	Washington, III	2027
Mr. Will Harron	Western Massachusetts, I	2027
Ms. Beverly Hurley Hill	East Tennessee, IV	2027
Mr. Patrick Kangrga	Massachusetts, I	2024
Dr. Julie Lytle	Massachusetts, I	2024
The Rt. Rev. Elizabeth Monnot	Iowa, VI	2027
The Rev. Dr. Cameron Partridge	California, VIII	2027
The Rt. Rev. Rayford Ray	Northern Michigan, V	2027
The Rt. Rev. Douglas Scharf	Southwest Florida, IV	2024
The Rev. Canon Tanya Wallace	Western Massachusetts, I	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024
Dr. Sarah Stonesifer Boylan, Liaison of Executive Council	Washington, III	2024
The Rev. Shannon Kelly, Staff	Massachusetts, I	2024

Representation at General Convention

Chair Elfring-Roberts and Vice-Chair Karr-Cornejo will represent the SCFMD at General Convention.

Mandate

2022 - Canon I.1.2.n.4

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

- i. Recommend policies and strategies to the General Convention for the affirmation, development, and exercise of ministry by all baptized persons (lay persons, bishops, priests and deacons).
- ii. Support Diocesan Commissions on Ministry in their support of the ministry of all the baptized, as set forth in Canon III.1 and Canon III.2.
- iii. Encourage the recognition of daily life ministries by Diocesan Commissions on Ministry, congregations, and dioceses, so that those ministries are celebrated as expressions of the ministry of all the baptized, worthy of equal respect with ordained vocations.
- iv. In collaboration with the churchwide office overseeing formation, develop and recommend to the General Convention comprehensive and coordinated policies for people across all ages and stages of life for lifelong formation as seekers and followers of Jesus.
- v. Recommend strategies to General Convention for the development and support of networks of individuals, diocesan committees and commissions, agencies and institutions engaged in recruitment, gifts of discernment, education and training for ministry, leadership development, hiring, and appointments.
- vi. Study the needs and trends of discernment and vocational opportunities for ordained leaders and lay professionals within the Church and the appropriate formation required to live into those opportunities.
- vii. Collaborate with those developing lay pathways grid and the Association of Episcopal Deacons to raise awareness of the competencies promulgated by those groups as guidelines for formation for those orders of ministry.
- viii. Recommend policies and strategies to the General Convention to ensure the fair hiring and compensation of lay and ordained employees in all ministry settings, with special attention to parity across those lines which have historically divided us, including but not limited to race, color, ethnic origin, national origin, sex, marital status, sexual orientation, gender identity and expression, order of ministry, disabilities, or age, except as otherwise provided by these Canons.

Summary of Work

The Standing Commission on Formation and Ministry Development (SCFMD) convened for the first time when TEC interim bodies gathered at the Maritime Conference Center, Linthicum Heights, Maryland, November 13-17, 2022. This report documents the first year of a newly reconstituted interim body focused on formation.

As befits a report from a group of formation folks, this report does not shy away from offering insights about **how** we learned alongside reporting on what we learned and what we achieved. Pedagogical comments offered here are not incidental asides: in formation work, the **how** (and the **with whom**) matters alongside the **what**: method, community, content. We are pleased to “show our work,” offering outcomes and being transparent about how we came to them.

Two points:

One, we seek to offer a **Blue Book report that asks good questions / makes questions visible**.

Two, **the Blue Book deadline is only one point in time, and that the SC and its work continues beyond that deadline**. The bluebook timeline demands focused, time-realistic goals; our continuing work invites more expansive proposals.

The profile for the next Presiding Bishop, published as SC worked, lists catechesis/formation as one of the challenges meriting particular attention during the next PB’s term. We are accordingly aware of timely import of this report, and celebrate the anticipated prominence of formation in the life of the Episcopal Church in the coming decade.

In its report to the 80th General Convention, the Task Force on Formation and the Ministry of the Baptized (this Standing Commission’s de facto predecessor body) called the church to the work of “re-orienting from ecclesio-centric ministries to missio-centric practices for parishes and worshiping communities; shifting from the vocation of the professionally trained “few” to the vocation of the locally trained “all.” This work of *reorientation* requires us to rethink the role of leadership in the church as well as how leaders are being formed to face the challenges and opportunities of the coming decades. We believe the current structures and institutions are not adequately preparing leaders to navigate the rapidly changing religious and ecclesiastical landscapes of our contemporary society.

The Standing Commission on Formation and Ministry Development is committed to the work outlined in our mandate, which includes evaluating current practices related to leadership development and discerning new pathways for leadership formation and training.

SCFMD was established in 2022 through Canon I.1.2.n.4. We acknowledge several particular challenges arising from being a newly-created body, and were determined not to be daunted by them: being a standing committee re-constituted after a hiatus, including re-claiming corporate/historical knowledge of work achieved and proposals explored by predecessor teams; the scope of mandate; and the

unusually short amount of time to work and report (about 13 months to our first Blue Book report deadline). We acknowledge as well the high proportion of members new to interim-body-level governance, learning the “how” of governance alongside doing the work itself, with the support, guidance, accompaniment of members more versed in this work.

Guided by several SCFMD members versed in the skills, models, and techniques of the College for Congregational Development, the key outcome of our April 2023 meeting was to generate a suite of “FROM/TO” statements about both our **deadline-based work leading up to BB deadline and GC 81**, and our **work relevant to SCFMD’s ongoing purpose**.

These statements encapsulate the knowledge of the “what-is” (clear eyed, reality based, on the ground perception of formation workers) and a vision of a better way. We offer this section of this report both as a **diagnosis**, grounded in observation and practice, of the current landscape of formation in TEC, and a **vision** of fruitful pathways and practices. While we have placed the full list of TO/FROM statements in an appendix, several to highlight include:

- FROM youth, camp, campus, and young adult ministry being widely underappreciated in TEC as locations of formation TO wide visibility, legibility, and integration of the formation work accomplished by YACM, ESC, ECCC
- FROM Scattered resource across dioceses and church groups TO a formation hub for all
- FROM uncertainty about the availability of Spanish-language formation and theological educational resources for mainland US Episcopalians and affiliated learners TO wider promotion and so awareness of such resources.
- FROM disconnected, isolated Commissions on Ministry (COMs), Divergent ways COMs think about competencies, uncertainty about how COMs address bias, gender, and diversity TO networked, connected, and resource-sharing COMS , greater collaboration while honoring diocesan differences, awareness of need and increased work by COMs around bias, gender, and diversity
- FROM lack of info about lack of information about domestic violence, gender violence, and suicide TEC-wide (all countries) TO such statistics gathered and shared
- FROM no plan to change the ordination process medical and psychological evaluation forms TO a plan for updating those forms
- FROM no plan to addressing continuing education on mental and physical health TO a plan for this

The appendix includes other instances of us “showing our work,” including our norms for our work together, and an inventory of “things we are excited about.” We invite readers of this report, as well as future members of the SCFMD, to find in the list a reflection of the areas of passion and attention which motivated the group as it first gathered in the fall of 2022.

A visioning document that emerged from our final session in November, facilitated by Bishop Betsey Monot, transcribed by Beverly Hurley Hill, and discerned by a small group of SCFMD members whose

travel arrangements made it possible to participate in the final morning of the residency. This list records insights shared insights/observations about the qualities which TRANSFORMATIONAL FORMATION EXPERIENCES have had (in our direct experience) in common.

The group also noted this common fact about “formation that transforms”: An encounter with “something different” was often a catalyst: Notably, transformation was not necessarily linked to the content of an encounter/practice **but to the contrast itself**; for example, the experience of informal camp-style worship for someone previously only familiar with Anglo-Catholic practice, or vice versa.

Crucially, this session, which tapped the profound “wisdom in the room” which we had named as an asset in our earliest conversations as a group brought us to the awareness that, having spent a large portion of the meeting time in sub-groups, and those being relatively task-focused, we had likely shortchanged “blue sky” work and whole-group imagining time that the assembly might have afforded us. **We offer this insight to later iterations of the SCFMD: even when the scope of the work seems enormous, do not rush into it, at the cost of not appreciating and benefiting from the company and wisdom of your gathered colleagues.**

Other things we learned along the way:

Time zones matter: By February 2023, there was a growing awareness of how our ability to work together was being impacted by a membership of being dispersed across five time zones. Though acknowledging the gift of our geographic diversity, subgroups were finding it difficult to meet and collaborate in real time. We realized that while our home locations were an invisible difference while gathered onsite, it is a difference that ideally could be considered as a factor among others when small working groups are constituted. This in itself seems like a vital learning as both governance and formation work happens increasingly online: the need for awareness and intentionality about the impact of time zones on groups’ ability to work together cohesively.

Physical location matters: Onsite formation, including residential seminaries, is impacted by the laws and policies of local and state governments. This observation was rooted in discussion of geographic location of the current number and location of residential Episcopal seminaries in the US, and raised pastoral concerns related to the political/social geography of our remaining residential seminaries: Are none are now located in states that are fully LGBTQ+ supportive, including around legal rights and access to health care? Members noted that this was the first time we had heard that specific impact of the closure of residential programs explicitly named. The governmental/legislative context of the state where a residential seminary is located can’t be ignored, and we risk excluding impacted folks from the possibility of residential formation. It’s worth noting in the context of this attention to residential MDiv-granting institutions that local formation programs are well-represented on the SC, by members who are program Deans: S Stonesifer-Boylan (Stevenson School), Y Gonzalez Hernandez (Diocese of Washington Latino Deacons’ School), and K Sundberg Seaman (NH School for Ministry).

THE HUB: A point of consensus among all four working groups is the creation, support, and ongoing maintenance of a digital formation hub for the whole church. There exists—published physically and online— a tremendous abundance of formation resources, curriculums and programs, resources curated by various independent entities (seminaries, Forma, TEC partners like ECF) and by authors contracted to commercial publishers. But what practitioner hasn't googled to find material? And googled with no guarantee that what comes up is coherent or aligned with how TEC teaches. And yet even as the SCFMD strongly asserts that a formation hub will address the “what” (the content) of formation— the work is not complete without continuing to attend to the trajectory of spiritual growth and lifelong learning captured in documents like the AED's “Competencies for Deacons” and the General Convention-endorsed document “A Christian Life of Faith: Signs and Thresholds Along the Way,”

[oo_A_ChristianLifeOfFaith_Booklet_FINAL.pdf](#)

The proposed resolutions as well as in the individual reports of the SCFMD's four working groups provided below document the SCFMD's work completed and further work envisioned as of December 2023. We invite the wider Episcopal Church to engage in the life of discipleship they offer.

Meetings

- November 2022, Maritime Center.
- 2 February 2023 over zoom
- April 24-26, 2023, Maritime Center
- 15 May 2023
- 21 June 2023
- 30 August 2023

Minuted Votes

SCFMD's onsite meeting, held April 24-26, 2023, at the Maritime Conference Center, Linthicum Heights, Maryland, included the following actions **voted on by the SCFMD:**

Related to A082: Molly James called the group's attention to A082, newly referred to the SC. Because of the wording of the resolution, it's necessary that the SCFMD vote and record in our minutes that until the new medical and psychological forms envisioned by A082 are created, the existing forms may continue to be used. Brian moved, Jess seconded, unanimous vote in favor of that motion. (4/24/2023)

Related to Do87: SCFMD moves to fund a taskforce of the SCFMC and/or engage a consultant to gather accurate information about how the GOE is being used (or not) by the dioceses, to understand what

other means are being used to assess preparation for ordination, all being work preliminary to proposing changes to the nature of the GOE. J Elfring-Roberts moved; J Lytle seconded; approved unanimously. (4/25/2023)

Related to A082 – SCFMD moves to fund a taskforce of the SCFMC and/or engage consultants to review and revise the medical and psychological evaluation forms used in the ordination process. C Partridge moved; J Lytle seconded; approved unanimously. (4/25/2023)

Related to C047: SCFMD moves to fund a taskforce of the SCFMC to address compensation and/or benefits for deacons and non-stipendiary priests. J Elfring-Roberts moved, B Denton seconded, approved unanimously. (4/25/2023)

Related to D030: SCFMD moves to form a taskforce of the SCFMC to explore options for the curriculum envisioned by D030, considering needs expressed by trans/non-binary Episcopal communities. SCFMD will collaborate with this taskforce in drafting our Blue Book report and resolutions. W Herron moved; C Partridge seconded; approved unanimously (4/25/2023)

Related to A085: Because the budgeting process is already underway, D Scharf requested that the SCFMD vote to support a budget request to fund and lay the groundwork for the creation, governance, and continuing maintenance of an Episcopal Formation Hub, in anticipation of the SCFMD writing and proposing such a resolution.

Reports from Working Groups and Subcommittees

Lifelong Formation

In response to the mandate of 2022-A019, the Lifelong Formation subcommittee devised several strategies to address the availability of materials for theological education in languages other than English. The subcommittee understands theological education broadly, that is, theological education serves folks called into ordained ministry as well as the many who minister as laypersons. Therefore, the subcommittee is interested in formal programs for theological education as well as resources available outside of degree-granting programs.

The subcommittee identified the need to focus on Spanish language resources for Episcopal churches and communities in the mainland US. An audit of the website catalogs for both Forward Movement and Church Publishing was conducted, focusing on language-of-composition of materials as well as materials available in translation. This audit shows that materials are published in English, and that materials available in languages other than English are translated from an English original. Much of what is published in Spanish are resources for forming disciples (including materials for personal devotion), and as such, can prove deeply useful to ministers (lay and ordained) as they carry out their work of discipleship. Generally, there are few Spanish-language resources available from either of these publishers that are suitable for the formation of ordained and lay leaders who will serve as

teachers of the faith. As a result of this work, in the next triennium the subcommittee will collaborate with organizations publishing material for theological education to discuss language and acquisitions policies. While translations of works in English are valuable, they come from a particular cultural perspective. Texts originally written in Spanish for Spanish-speakers, or written in Spanish and translated to English, would broaden the perspectives available within theological education for all.

In addition to publishers, the subcommittee seeks to gather and disseminate information about the work done in seminaries and formation programs to provide Spanish language material to facilitate networking and resourcing across the church.

Finally, connected to the issue of language access and lifelong formation, the subcommittee was made aware of the need for the catechism in the 1979 Book of Common Prayer to be translated into a wide range of languages as a tool both for formation and evangelism. Resolution proposes to fund this endeavor.

In response to the mandate of 2022-D030, in April 2023 this subcommittee moved to form a task force to discuss the status of the D030 curriculum and the needs of our trans and non-binary Episcopal communities. Initial conversations took place, convened by members of the task force members J Lytle and C Partridge convened a series of conversations, which included Weston Morris, M. E. Eccles, Laura Jackson, Heather Barta. These conversation partners represented supportive institutions and groups, including TransEpiscopal, The Partners' Path, Province V, and Bexley Seabury, as well as people with personal experience in the topic, including trans and non-binary individuals, and family of trans and non-binary individuals. The task force affirms the need to develop resources and training despite the lack of funding associated with 2022-D030. As discussions continued as to the materials already available, the following was observed:

- A. There are already bibliographies, materials, and approaches that engage theologically and that need to be highlighted to the church. These include material curated by the Rev. Dr. Cameron Partridge, pedagogical resources on “Embracing Gender Complexity” from Dr. Julie Lytle, resources developed by and for the organization *Welcoming Every Body*, and the embodied approach taken by theologian Susan Cornwall.
- B. There are many strong resources for a “Trans 101” type of education that should be compiled as a reference resource.
- C. Formation and transformation does not stop with “Trans 101.” There is a desire and need to deepen conversations and widen the circle, however, there are particular audience with different needs. There is a desire to provide resources that speak to particular demographics, such as Trans/non-binary/gender-variant adults; Trans/non-binary/gender-variant children; parents, grandparents, siblings and other family members of trans/non-binary/gender variant kids seeking support and guidance about parenting well; cis partners of trans people; faith community leaders of all stripes - lay leaders, those preparing for ordained ministry, current clergy (deacons, priests, and bishops); and people who are not aware of any particular relation

they may have to this subject but are open and want to learn more as well as those who are closed and don't think they have a reason to think about the subject

- D. Resources need to include ways to respond to fear and hostility when trans and non-binary people are present and/or topics discussed.

The task force identified a range of possible offerings: print and video resources, course/s, symposia, targeted conversations, and the creation of affinity groups. Further discussion focused on a coordinated approach in conversation with existing collaborative initiatives in Province V. Grant funding is being pursued to support the development and implementation of courses and training for conversations and facilitation. As part of the broader work of the Standing Commission, we envision these resources being made available to the church through a digital resource hub and church leadership.

Commissions on Ministry

This subgroup sought to connect with all the COMs, initially to facilitate province-wide conversations. In practice, this proved challenging, even at the level of how to find out who chairs a diocese's COM.

The subgroup prepared a set of questions for the provincial gatherings of chairs of diocesan Commissions on Ministry that they convened:

1. What do you see in the mandate of the SCFMD that affirms your work? What do you see in the mandate that challenges it?
2. How do you measure competencies within the canonical areas? Do you use the GOE? If so, how? What other tools, practices, or processes do you use?
3. Do you have areas of strategic focus particular to your diocese/context that govern the way you do your work as a COM? (For example: young vocations)
4. How does your COM relate to your bishops? How does your COM relate to your Standing Committee? Are there particular practices you use in those relationships? (e.g. regular meetings with the bishop / bishop attending COM meetings; meetings with Standing Comm) Canon 3 section 4 "support for ordination processes... either lay or ordained" - how are COMS supporting the laity in discerning their vocations?
5. How do you talk with applicants and people in discernment about confronting and engaging bias in themselves, in their communities, and in the wider country-especially with regard to racism, sexism, heterosexism, cissexism, and classism.
6. How do you seek ongoing training for your work as a COM? Anti-bias training especially.
7. Psych evaluations - what do you look for in those who do psychological evaluations, and how do you assess potential bias in those conducting psych evaluations?

8. How are people going through the discernment process engaging theological education? Are they going to residential seminaries? Local formation contexts?
9. How do COMs support and assist those who discern/are discerned not to move into orders that they feel called to?

The longer term vision is that COMs would network with each other steadily. The COM chairs who were able to take part in the provincial gatherings convened by the SCFMD subgroup embraced that hope. The invitation to gather for discussion was an enormous plus in their books. They liked that they could hear how others navigate the process. Many remarked that it was the first time they had ever been brought together. They gathered information from each other and planned to meet again on their own.

In these provincial conversations, it became clear that the culture and dynamics of each diocese heavily influenced how they carried out formation and discernment. Smaller dioceses often partner with other dioceses to create a process to collectively carry out the work. Dioceses that cover large and/or remote geographic areas noted the accompanying challenges of bringing together an practical number of people for training, which has discouraged getting together in person for training of lay people who have a calling to licensed ministry.

In dioceses where COM members perceived that they were operating within a familiar and functioning system, there seemed to be less immediate interest in innovation.

Generally speaking, COMs reported strong relationships with others in authority about discernment/ordination process, with their diocese's Standing Committee and its Bishop.

Many noted that in practice, even as they were aware of the expectation to discern and support ministry by all the baptized, they focused primarily on the discernment process towards ordination, at the cost of supporting discernment for the laity.

Many COMs said that they needed more resources to carry out their work.

Salient responses to the subgroups' questions, with data supplied from Provinces 1, 5, 6, 7, and 8, include:

Bias: questions touched on this directly (regarding addressing bias in COMs, in discerners, and in the professionals who administer the canonically required psych evaluation) and indirectly– in the context of ordination exams, for example.

Within COMs: dioceses who are able to convene a diverse COM find that helps address bias. But none of the participating COMs reported regular attention to combating bias (including implicit bias), either in onboarding/initial training or in COM continuing education. Numerous COMs affirmed that such training would be valuable.

Within discerners: It is common to rely on CPE to surface and address bias; evidence of bias in a discerner can be a prompt for a “go slow” in the discernment/formation process. There is some frustration with the availability of programs to satisfy canonical anti-racism training. There is clear traction in anti-racism training for all as well as Becoming Beloved Community initiatives (especially Sacred Ground), but there is little presence of anti-bias training for ministers and COM. Diversity on the CoM helps.

In those conducting psych evaluations: apparent pattern of a diocese relying on one practitioner, and for a long time. Report vetted by bishop only, or bishop and designate. Psychological evaluations were largely a “black box” in the bishop’s office with a few exceptions where the CoM chair is engaged and sees the report outside of red flags from bishop to CoM.

GOE: some correlation exists between how/where a person was formed and what form their ordination exam takes. Generally speaking, dioceses with more priests preparing through a residential / MDiv/ CAS program are more likely to use the GOE; when a diocese has more preparing for ordination through local formation, the use of a diocesan exam is more likely. However, this pattern is by no means absolute or predictive.

Bias in the GOE was cited by several dioceses as a factor in choosing not to use it.

Dioceses that do use the GOE, regardless of how their ordinands are formed, generally assert: that it is used as a tool for evaluation, not as a tool to obstruct or eliminate a candidate, that it helps identify gaps in training, education, thought process; it is a tool to create remediation program to fill holes and to support the people; folks are counseled to lower stress because they won’t be dismissed from the ordination process solely on GOE results. Several dioceses noted that the exam fee is high.

There were several hopes expressed by multiple COMs: to increase Licensed Lay Ministry, to widen the culture of discernment – for example, at parish level, to support discernment for people generally. On both these things, there is deep desire but not a clear path forward. And there was a great awareness of the need to expand the invitation to discernment to folks of non-white culture/heritage.

With regard to working with candidates who were not given the "green light" to move forward in the process, many did not have a formal process to work with those folks. One Diocese did remark that they always end with "yes", and if they were to not move forward in the process, they were referred back to the parish to work with them on an appropriate vocation discussion. Too often, “We lose people who come with beautiful gifts because we do not shepherd them after that.”

SUMMARY: Group was struck by how varied the formation process looked across dioceses. Some Dioceses require formal seminary training; allowing for some hybrid education as well. Many COMs mentioned that they do local formation almost exclusively. Going in to this survey under the assumption that there was more consistency church-wide than the provincial conversations revealed.

Mental Health

This subcommittee of the Standing Commission collaborated with the Task Force for Ministry to Individuals with Mental Illness in supporting formation resources regarding mental health first aid, destigmatizing mental health problems, and providing appropriate training in the different linguistic and cultural communities of which the church is composed.

In the coming Triennium, this subcommittee intends to continue collaboration with the Task Force for Ministry to Individuals with Mental Illness as well as church staff working in this area. There is a desire to collaborate and energy to support the resolutions put forward by that task force which regard the completion and translation / cultural adaptation of curriculum, the operationalization of training clergy and postulants, the deployment (and increase via further training) of Mental Health First Aid instructors, and the establishment of a Standing Commission for Human Health and Wellness.

In addition, the subcommittee plans to pursue additional resources and connections related to suicide prevention in at-risk populations such as veterans; and to work with existing groups and materials to provide resources to address gender-based violence in the LGBT2SQIA+ community.

Leadership Development

The key discernment of Leadership Development subgroup is the intention to partner with the Society for the Increase of Ministry (SIM), which has been awarded a project grant from Trinity Church, Wall Street to fund a two-year grassroots engagement with Commissions on Ministry to lead local dioceses through a process of listening, learning, supporting, and visioning possible futures of the discernment process for ministry in The Episcopal Church. In collaboration with SIM and other church-wide groups and organizations, we plan to conduct a church-wide assessment of current discernment and formation practices, including local Schools for Ministry.

In addition to the general nature of our work described above, we have been specifically tasked with making recommendations in the following areas:

I. Development and Support of Ministry Networks

The work of leadership development across all orders of ministry requires efficient and convenient access to formation resources for lay and ordained vocations. We are proposing a resolution that supports the recommendation made to the 80th General Convention calling for the creation of a digital hub for Episcopalians to access these formation resources. This digital hub would also serve as an online forum for ongoing communication between various church-wide groups and organizations that are focused on the work of formation and leadership development. We have explored possible URLs for a website to house this digital hub and developed tentative plans for the ongoing maintenance of such a website.

II. Core Competencies for Lay and Diaconal Ministry

Our mandate calls us to collaborate with those developing the lay pathways grid and the Association of Episcopal Deacons to develop core competencies for lay and diaconal ministry. Although we have

initiated these church-wide conversations, the shortened period between conventions did not afford us sufficient time to fully explore these possibilities. We intend to devote more time to this effort in the next triennium in order to present a more fulsome report with recommendations to the 82nd General Convention in 2027.

III. Fair Hiring and Compensation Practices

Our Standing Commission was tasked with reviewing resolution 2022-Co47, which calls for the establishment of minimum compensation standards for deacons. We evaluated this resolution in light of our broader mandate to “recommend policies and strategies to ensure fair hiring and compensation.” Consequently, we are proposing a resolution calling for the creation of a task force “to conduct a comprehensive study and analysis of existing hiring practices, identify areas for improvement, and propose recommendations for implementing fair hiring policies across all levels of the Church's structure.” In addition, we are proposing a resolution specifically calling for the creation of a task force “to study the compensation and benefits for deacons and non-stipendiary priests,” as we believe this topic needs separate attention. Together, these two task forces will provide guidance and recommendations concerning future policies and strategies related to fair hiring and compensation for all those who work in the church, lay and ordained.

Proposed Resolutions emerging from this subgroup’s work are presented at the end of this document.

Raising awareness of the pathways grid titled ““A Christian Life of Faith: Signs and Thresholds Along The Way” and the work of the Association of Episcopal Deacons

The Association for Episcopal Deacons is the preeminent diaconal association of the Episcopal Church. It exists to enable the diakonia (diaconal service and action) of all the baptized. To this end, it encourages every diocese to develop programs to ordain deacons, and provides resources to recruit and select, form, deploy, supervise and support deacons. Their [website](#) makes these resources available.

AED updated their [competency recommendations in 2018](#). Their competencies are based on CANON III.6.5 (f)

The Canons of the Episcopal Church provide: Before ordination each Candidate shall be prepared in and demonstrate basic competence in five general areas:

1. Academic studies including, The Holy Scriptures, theology, and the tradition of the Church.
2. Diakonia and the diaconate.
3. Human awareness and understanding.
4. Spiritual development and discipline.
5. Practical training and experience.

Their intent in developing this document is not that these competencies and examples become rigid standards across The Episcopal Church. These competencies are to guide formation, self-assessment, discernment and evaluation of those preparing to be deacons, and ordained deacons. As a guide, the competencies and examples should be adapted to the context and specific call of the individual. It is likely that no individual will master all of the competencies as stated nor demonstrate all of the examples. They are set forth to assist formation directors, bishops, archdeacons, nominees, postulants, candidates, ordained deacons and Commissions on Ministry, among others.

We recommend that each diocese have a liaison on their commission that is focused on diaconal discernment. This person could be a deacon or understand the call/ministry of a deacon. The Liaison would connect with the Association of Episcopal Deacons (AED). They would become familiar with the AED's updated competencies and update the COM on new findings or changes to the AED's recommendations.

We recommend that the Deacon liaisons on a quarterly or monthly basis to network and share resources. The AED would be a support line for questions as well as resources will be available on the hub.

We recommend each liaison scheduling time of each Commission on Ministry to Education Using the document "A Christian Life of Faith: Signs and Thresholds Along The Way" as a guide, and the [AED Competencies](#)

We recommend that a survey be conducted as to what dioceses have a lay discernment process and collect information on how their process is done.

Exploring pathways for Church Pension vesting

Clergy receiving any amount of regularly scheduled compensation, who meet the eligibility requirements for participating in The Church Pension Fund Clergy Pension Plan (the Plan) and become vested in the Plan may be eligible for benefits as summarized below.

Outlined below are some of the benefits provided to eligible Active and Retired clergy. The example shown is based on a cleric having Total Assessable Compensation (TAC) of \$300 per year, or \$25 per month, with 10 years of earned Credited Service (CS) at the time of retirement.

If you participated in The Episcopal Church Lay Employees' Retirement Plan or the Staff Retirement Plan of The Church Pension Fund and Affiliates, your vesting service under those plans will count for vesting purposes under the Clergy Pension Plan. You must provide a written request to CPF, along with any required supporting documentation, in order to receive vesting credit.

To be eligible to receive a pension benefit from the Clergy Pension Plan upon retirement, you must become vested. You become vested when you earn 5 years of credited service or are 65 or older while an Active participant. (For example, if you find your first employment in the Church when you are age

67, you will be fully vested under the Clergy Pension Plan after your employer makes the first Assessment payment on your behalf.)

Benefits of Pension if giving minimum of \$300/year (\$25/month)

- While Active, life insurance benefit (6 x TAC): \$1,800
- When Retired, life insurance benefit (6 x HAC): \$1,800
- Annual pension benefit (2.75% x HAC x CS): \$82.50***
- Annual Christmas benefit (\$25 x CS): \$250***
- Resettlement benefit (one-time payment at the time of retirement equal to 12 times the monthly retirement benefit with a minimum of \$2,000): \$2,000

Conferences available to eligible clergy

- Invitation to CREDO and Planning for Wellness Conferences

CPG worked up some of the scenarios for what it would look like based on the \$25 stipend with various years of service.

[\\$25/month](#)

[\\$100/month](#)

Church Pension also has a detailed [Guide to Clergy Benefits](#)

We recommend that each diocese work with its chancellors to explore legal ways of compensating deacons and non-stipendiary priests regarding state law (minimum wage laws) in a way so that they are eligible for benefits. Each state has different laws. We also recommend collaborating with Church Pension Group to create video/audio materials to help with explanation.

Recommend strategies for the support of networks

Our recommendation for supporting the various networks within and connected to the Episcopal church is to create a comprehensive learning and resource platform. This centralized hub will provide a one-stop destination for Episcopalians to access a wide range of educational resources. This can include materials for lay leaders, clergy, and individuals of all ages, fostering a comprehensive and continuous learning experience.

Lay Leadership Development:

- Empowering lay leaders is crucial for the growth and vitality of any religious community. The hub can offer training modules, workshops, and materials specifically tailored for lay leaders, helping them develop the skills and knowledge needed to contribute effectively to their congregations.

Formation Resources for All Ages:

- Catering to individuals of all ages ensures that the formation hub addresses the diverse needs of the Episcopal community. Resources can be categorized for children, youth, young adults, and adults, promoting lifelong learning and spiritual growth within the context of different life stages.

Community Building:

- The hub can facilitate connections and networking among various Episcopal entities, fostering a sense of community and collaboration. This can include partnerships with dioceses, congregations, educational institutions, and other Episcopal organizations, creating a supportive network for shared resources and best practices.

Accessible and Inclusive:

- By providing online resources, the Episcopal Formation Hub can reach a broader audience, including those who may not have easy access to traditional educational opportunities. This inclusivity can enhance participation and engagement across different demographics and geographic locations.

and Flexibility:

- A digital hub allows for easy updates and adaptations to changing needs. New resources, updated materials, and emerging topics can be incorporated swiftly, ensuring that the hub remains relevant and responsive to the evolving requirements of the Episcopal community.

Measurement of Impact:

- A digital platform allows for the collection of data and analytics, enabling organizers to measure the impact of the hub. This information can be used to assess the effectiveness of various resources, identify areas for improvement, and make data-driven decisions to enhance the overall impact of the Episcopal Formation Hub.

We will recommend this be a three step process.

1. Discovery: We recommend gathering data from Episcopal Entities focused on education, formation, leadership, and ministry.
2. Analysis: Review data, identify trends, create categories, etc .
3. Reporting: hire a professional web designer to create a visually attractive and intuitive website. (www.episcopalformation.org) *using the grids (Pathways and AED) to potentially guide the hub: claiming, engaging, sustaining, cultivating

By combining these advantages, an Episcopal Formation Hub has the potential to create a dynamic and supportive environment for spiritual growth, learning, and collaboration within the Episcopal community.

Proposed Resolutions

A132: Establishing an Online Hub for Continuing Formation and Ministry Resources

Resolved, That the 81st General Convention reiterates its commitment to the establishment of an Online Hub for Continuing Formation and Ministry Resources; and be it further

Resolved, That the General Convention acknowledges the lack of funding from previous conventions, hindering the progress of critical work identified by the Task Force on Formation and Ministry of the Baptized; and be it further

Resolved, That this Online Hub will serve as a central repository of vetted resources, ensuring that leaders have access to adaptable materials for their specific contexts, fostering ongoing formation, and addressing the current void left by the absence of sustained denominational-level work; and be it further

Resolved, That the Online Hub, curated by subject-area experts, will connect leaders with proven formation processes, materials, and networks to facilitate vocational development, thereby alleviating the need for leaders to develop tools independently; and be it further

Resolved, That this resolution emphasizes the urgency of providing leaders with a starting point for spiritual discernment, leadership development, and ordination preparation, recognizing the diverse situational needs within The Episcopal Church; and be it further

Resolved, That the General Convention urges the allocation of funds to support the establishment and maintenance of the Online Hub for Continuing Formation and Ministry Resources in the upcoming triennium.

EXPLANATION

The Standing Commission on Formation, the Task for on Formation and Ministry of the Baptized, and the Task Force on Theological Networking have served as short-term solutions for ongoing denominational-level work within The Episcopal Church; and despite the passing of legislation in previous General Conventions, funding has not been allocated for the implementation of these crucial tasks, hindering progress and development; and there is a pressing need for a sustainable and accessible platform that provides vetted resources for leaders to adapt within their unique contexts, fostering ongoing formation and ministry development. An online hub curated by subject-area experts would uplift diverse voices from across The Episcopal Church and the Anglican Communion, offering leaders a centralized starting point for their spiritual discernment, leadership development, and ordination preparation; and would network the resources currently available but often siloed in such entities and individuals as the Department of Faith Formation, Episcopal Camps and Conference Centers, Association of Episcopal Deacons, Young Adult Campus Ministers, Young Adult Service Corps, Episcopal Service Corps, FORMA, Schools for Ministry, Education for Ministry, and Seminaries.

A133: Establishing a Taskforce for the Study of Fair Hiring Policies within The Episcopal Church

Resolved, That the 81st General Convention establishes a Taskforce on Fair Hiring Policies within The Episcopal Church to conduct a comprehensive study and analysis of existing hiring practices, identify areas for improvement, and propose recommendations for implementing fair hiring policies across all levels of the Church's structure; and be it further

Resolved, That the Taskforce composition shall be inclusive and diverse, reflecting the broad spectrum of The Episcopal Church, and shall include representation from clergy, laity, and experts with experience in human resources, diversity, and inclusion. The Taskforce shall be charged with, but not limited to, the following responsibilities:

- Conducting a thorough review of current hiring policies within The Episcopal Church.
- Analyzing data on past hiring practices to identify trends, disparities, and areas for improvement.
- Consulting with stakeholders, including dioceses, congregations, and affiliated entities, to gather input and insights.
- Developing a set of recommendations and guidelines for fair hiring practices that align with the Church's commitment to justice, diversity, and inclusion;

And be it further

Resolved, That the Taskforce shall present its findings and recommendations at the 82nd General Convention, accompanied by a comprehensive report detailing the study's methodology, key findings, and proposed fair hiring policies; and be it further

Resolved, That the Taskforce may collaborate with relevant committees, commissions, and organizations within The Episcopal Church to ensure a coordinated and effective approach to implementing fair hiring policies; and be it further

Resolved, That a budget of \$75,000 be allocated to support the work of the Taskforce, covering expenses related to research, outreach, and the production of the final report.

EXPLANATION

The Episcopal Church is committed to fostering an inclusive and equitable community that reflects the principles of justice, fairness, and respect for all individuals; and fair hiring practices are integral to upholding the values of our Church and ensuring that our leadership and staff embody the diversity and inclusivity we strive for; and The General Convention recognizes the importance of thorough and informed study to develop effective policies that promote fair hiring practices throughout The Episcopal Church. The Episcopal Church is committed to fostering an inclusive and equitable

community that reflects the principles of justice, fairness, and respect for all individuals. Fair hiring practices are integral to upholding the values of our Church and ensuring that our leadership and staff embody the diversity and inclusivity we strive for. The General Convention recognizes the importance of thorough and informed study to develop effective policies that promote fair hiring practices throughout The Episcopal Church.

A134: Establishing a Task Force for the Funding and Study of Compensation and Benefits for Deacons and Non-Stipendiary Priests

Resolved, That the 81st General Convention establishes a Task Force to Study of Compensation and Benefits for Deacons and Non-Stipendiary Priests; and be it further

Resolved, That the Task Force composition shall be diverse, inclusive, and representative of the broader Episcopal Church, including individuals with expertise in clergy compensation, finance, and those who have direct experience as deacons or non-stipendiary priests; and be it further

Resolved, That the Task Force is charged with, but not limited to, the following responsibilities:

- Conducting a thorough study of current compensation and benefit structures for deacons and non-stipendiary priests.
- Examining data on compensation trends, disparities, and challenges faced by deacons and non-stipendiary priests.
- Consulting with stakeholders, including dioceses, congregations, and relevant committees, to gather insights and recommendations.
- Developing a set of recommendations and guidelines for fair compensation and benefits that align with the Church's values and commitments;

And be it further

Resolved, That the Task Force shall seek external funding to support the execution of the study, ensuring its independence and thoroughness; and be it further

Resolved, That a budget of \$60,000 be allocated to the Task Force to cover expenses related to research, outreach, and the production of the final report; and be it further

Resolved, That the Task Force shall present its findings and recommendations at the 81st General Convention, accompanied by a comprehensive report detailing the study's methodology, key findings, and proposed compensation and benefits guidelines; and be it further

Resolved, That the Task Force may collaborate with relevant committees, commissions, and organizations within The Episcopal Church to facilitate the implementation of recommended policies; and be it further

Resolved, That this resolution shall take effect immediately upon its adoption.

EXPLANATION

Deacons and non-stipendiary priests play a vital role in the ministry and mission of The Episcopal Church, contributing significantly to the spiritual well-being of our communities. It is essential to ensure that deacons and non-stipendiary priests receive fair and equitable compensation and benefits for their dedicated service. A comprehensive study is necessary to assess the current state of compensation and benefits for deacons and non-stipendiary priests within The Episcopal Church, identify areas of improvement, and recommend strategies for implementation;

A135: Compensation for Non-stipendiary Clergy

Resolved, That the 81st General Convention requires that all active currently non-stipendiary clergy of any order under the age of 72, canonically resident in and serving in the Episcopal Church, and with a current letter of agreement with the congregation or entity they serve, be paid a minimum of \$25 per month and assessment be paid on their account to the Church Pension Fund (CPF) beginning January 1, 2025; and be it further

Resolved, That compensation may be designated as housing allowance with agreement of the clergy and vestry of the congregation served; and be it further

Resolved, That two or more congregations or entities served by the same clergy person must agree in a timely manner upon the fair allocation among them of the costs of the clergy's compensation and the related assessment to the CPF. Those congregations must also in a timely manner decide on a process for paying those amounts, which may require one congregation to be responsible for communicating with and paying the CPF; and be it further

Resolved, That compensation paid under this resolution does not replace payment on behalf of the clergy by the congregation or the diocese for the expenses of Diocesan Convention, Clergy Conference, continuing education, discretionary fund, or mileage, and other expenses as may be established in the letter of agreement.

EXPLANATION

Compensation for traditionally non-stipendiary clergy promotes equity, diversity, and inclusion for all who may feel called to ordination. Providing compensation for all our clergy is an investment in our future clergy.

The financial burden of formation and service as an unpaid clergy person (deacon or priest), is a barrier for many who need to balance costs and demands of their call with the practical needs of their lives.

Currently many non-stipendiary clergy are retired and in households where they do not need to earn a living. The demands of earning to support self and family and limited discretionary income are real barriers to answering God's call; these barriers are most felt by marginalized groups. Thus most non-stipendiary clergy now serving live with significant privilege. Lack of compensation is an unwritten barrier to Christians who are young, are without adequate employment, are without resources to assist in planning for their futures.

God shows no partiality; the call to ordination is not limited to those with means and leisure; ordination should be inclusive and representative of all parts of society—by age, economic status, ethnicity, race, gender identity.

The BCP bids that the “Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families (p. 445, Thanksgiving for a Child). Access to the benefits of enrollment in the Church Pension Fund assists non-stipendiary clergy to do so.

We are told that the Church Pension Fund would like to assist all clergy; it cannot do so for clergy not enrolled with assessments paid to the Fund. Potential benefits for eligible clergy include (eligibility is very broadly defined):

- Pension (depending on years of assessment paid)
- CREDO
- Access to financial planning
- Medicare supplement plan
- Disability benefits
- Mental health resources

Similar resolutions have already passed by a number of diocesan conventions. We ask the Episcopal Church to recognize that compensation for non-stipendiary clergy is a move towards equity and inclusion of marginalized groups who will be our future leaders.

A136: Translating the Catechism

Resolved, That the 81st General Convention recognizes the need for access to the catechism in the Book of Common Prayer in languages beyond English, Spanish, French, and Haitian Kreyol and directs the Task Force on Translation and Interpretation to facilitate the professional translation of An Outline of the Faith, commonly called the Catechism to Arabic, Dutch, Georgian, German, Italian, Korean, Mandarin, and Russian; and be it further

Resolved, that said translations be made available digitally; and be it further

Resolved, that the sum of \$50,000 be appropriated for the completion of these translations and their distribution.

EXPLANATION

The 1979 Book of Common Prayer has been translated from English into Spanish, French, and Haitian Kreyol. However, there are Episcopal congregations that include additional language communities who cannot access a basic statement of Episcopal belief and practice, which can serve both evangelistic and formational purposes.

The amount requested is commensurate with the amount of work required for professionally translating a text of approximately 4500 words into multiple languages and to enable digital availability.

A137: Create a Task Force for Youth Formation and World Mission

Resolved, That the 81st General Convention establish a Task Force for collaborative research, relationship-building and program development for the purpose of identifying, sharing and developing global mission opportunities for youth (ages 13-21) in The Episcopal Church; and be it further

Resolved, That the Task Force gather information on programs and resources currently in use across The Church, highlighting particularly the areas of intersection that exist between the formation of Christian identity and the expression of God's love through loving our neighbors near and far and especially in global and intercultural contexts, and be it further

Resolved, That the Task Force may be comprised of membership including, but not limited to, from Interim Bodies, relevant Episcopal Church entities, youth (ages 13-21), and representation from domestic and non-domestic dioceses with special consideration given to inclusion of persons from non-English speaking dioceses, jurisdictions, and mission areas; and be it further

Resolved, That the General Convention request a budget allocation of \$30,000 for the implementation of this resolution.

EXPLANATION

Acknowledging the myriad ways in which world mission and faith formation intersect with other disciplines and ministries in The Episcopal Church and beyond, and lifting up the increasing need for vocational discernment and formation opportunities for young people, the Standing Commission on World Mission and The Standing Commission on Formation and Ministry Development call for the creation of a Task Force to study, network and share resources regarding the formation and discernment of young people in global and intercultural contexts. The two Commissions seek to work in partnership with each other, the relevant TEC offices and stakeholders across the Church including, but not limited to, the Standing Commissions for World Mission and Formation and Ministry Development, and Office of Youth and Young Adult and Campus Ministries, the Office of Global Partnerships, the department of Faith Formation, the Young Adult Service Corps, Episcopal Camps and Conference Centers, seminaries and diocesan formation programs.

Meeting the emerging needs of youth in the context of a changing Church and world requires new ways of collaborating and imagining God's dream for our world. Currently, there are no ways for youth to access global mission travel, pilgrimage or learning opportunities unless they are able to access it privately or are resident in a diocese or parish that offers such programming. Such inequality must be resolved by sharing opportunities more broadly across the Church.

This Task Force would do the research of discovering what resources and programs are working well to highlight formation as growth experience, and global mission as an inherent expression of our Christian faith in the Episcopal tradition. Intercultural programming could be included in this body of work, as welcoming new Americans and immigrants through migration ministries is a facet of global work, conducted within our own communities. The work of the Task Force over the course of the upcoming triennium may include lifting up existing resources like the Toolkit for Pilgrimage, exploring opportunities for collaboration (even across dioceses) ensuring all young Episcopalians have access to intercultural and international programming, adapting the Guiding Principles and Global Mission Toolkit put out by SCWM for use specifically with persons aged 13-21, identifying opportunities for dioceses/parishes with global mission experience to become mentors to those interested in growth, exploring ways to incorporate/adapt anti-racism and anti-colonialism training for young people and coupling that learning with opportunities to engage that work as Episcopalians in the world, creating opportunities for vocational discernment for youth interested in international and advocacy work, making known the possibilities to work alongside our global partners within the structure of the church, and potential for collaboration with the new Global Mission Advocates Network through the Standing Commission on World Mission.

Acknowledging that world mission and migration ministries will only increase in volume and urgency as climate change redefines our human existence, and that the landscape for young peoples' formation and participation in church is changing rapidly, a Task Force for sharing, resourcing and innovating in these areas in the Church is essential.

Supplemental Materials

One: SCFMD covenant/group norms

Intentionally grounding this work together in our shared life in Christ, we will:

- *Listen to each other; we will not interrupt.*
- *Wait for each other: group discussion will be paced to allow time for silence, reflection, processing.*
- *Assume the most generous interpretation possible of our colleagues' words or actions.*
- *Acknowledge our responsibility to transparently document our work through published minutes of SCFMD meetings. And, guided by the question "Is this my story to tell?", we will honor our working space as safe/brave space for the group by not publicly disclosing details of our working deliberations or conversations.*
- *Decide by consensus whenever possible, acknowledging that this calls us to be honest about dissent during discussion, and commit to living with the group's consensus.*
- *Let our "yes" be yes and our "no" be no: having made a promise about a task or a deadline, we will keep those promises; we will respect a colleague's decision when they decline a task.*
- *Share in nurturing the group's spiritual life, through a rota for leading prayer, Bible study, or other practices.*

Two: What we are excited about for formation work

- *Remote and in-person learning opportunities and challenges*
- *Communities of learning*
- *Local formation*
- *How we form for ministry*
- *How we form young people*
- *Discernment and conclusions: what happens after a discernment process*
- *Theological education standards*
- *Attention to outcomes*
- *Accessibility (especially for younger people)*
- *Leadership development*
- *A belief that formation needs to be transformation*

- *Attention to dissemination strategy and tools*
- *Gaining a comprehensive and deep understanding of what formation is*
- *Resource accessibility - democratize for all ministers*
- *New methods/teachings of discernment for ministry : For ALL the Baptized*
- *How do we as a Standing Commission honor our short time together and how can we offer effective tools that assist people “on the ground”*
- *President of the House of Deputies Julia Ayala Harris’s themes of “Accessibility, Inclusion and Safety” as guiding principles/value lenses for our work*

Three: What makes formation transformational?

A final visioning document emerged from the concluding session in November, facilitated by Bishop Betsey Monot, transcribed by Beverly Hurley Hill, and discerned by a small group of SCFMD members whose travel arrangements made it possible to participate in the final morning of the residency. This list records insights shared insights/observations about the qualities which, in our direct experience, TRANSFORMATIONAL FORMATION EXPERIENCES have had in common:

- *Small group communities*
- *Practices - full body*
- *Embodiment - experiential*
- *Active learning*
- *Self-direction*
- *Liturgy*
- *Safe spaces*
- *On-going - slow formation - illuminated by moments*

The group also affirmed that Formation leaders are needed to facilitate/lead transformational work and that Offerings are needed to help develop practices of discernment in community for all.

The group also noted this common fact about “formation that transforms”: An encounter with “something different” was often a catalyst: Notably, transformation was not necessarily linked to the content of an encounter/practice but to the contrast itself; for example, the experience of informal camp-style worship for someone previously only familiar with Anglo-Catholic practice, or vice versa.

Four: From/To statements

In our initial work we seek to move:

- FROM relative vagueness of the mandate’s direction to consider formation for “all ages and stages” TO more specificity about who is served and who serves them
- FROM youth, camp, campus, and young adult ministry being widely underappreciated in TEC as locations of formation TO wide visibility, legibility, and integration of the formation work accomplished by YACM, ESC, ECCC
- FROM Scattered resource across dioceses and church groups TO a formation hub for all
- FROM disconnected, isolated Commissions on Ministry (COMs) TO networked, connected, and resource-sharing COMS
- FROM Diverse ways COMs think about competencies TO greater collaboration while honoring diocesan differences
- FROM uncertainty about how COMs address bias, gender, and diversity TO awareness of need and increased work by COMs around those issues
- FROM not questioning the General Ordination Exam TO questioning the GOE’s suitability to assess formation
- FROM lack of info about lack of information about domestic violence, gender violence, and suicide TEC-wide (all countries) TO such statistics gathered and shared
- FROM no plan to change the ordination process medical and psychological evaluation forms TO a plan for updating those forms
- FROM no plan to addressing continuing education on mental and physical health TO a plan for this
- FROM uncertainty about the availability of Spanish-language formation and theological educational resources for mainland US Episcopalians and affiliated learners TO wider promotion and so awareness of such resources.
- FROM frustration with an incomplete vision of our immediate work TO excitement about generating a **Blue Book report that asks good questions / makes questions visible**

As the SCFMD’s work continues, we seek to move:

- FROM a scattered approach TO a clear direction and vision for the SC
- FROM a newly formed SC TO a SC in touch with the work of its predecessor bodies and other SCs and groups doing work relevant to our mandate

- FROM a newly established team unfamiliar to each other TO a fuller inventory of gifts we bring to this work (with the clarifying point that, as a Standing Committee, this interim body will continue, with regular changes in membership)
- FROM a lack of clarity why this SC exists TO clarity about our function and purpose
- FROM a model of scarcity TO a model of abundance
- FROM a bias towards discernment for ordained ministry TO discernment for all
- FROM resting in historical and traditional understanding of “church” TO allowing room for the Holy Spirit to lead to new, innovative ideas
- FROM the existing level of support and resources for formation TO providing useful and accessible support and resources
- FROM a scattered/piecemeal approach to addressing formation topics TO clear vision and goals for long-term work.

Explanation and Content of To/From Statements

April’s gathering also saw a return to visioning work, inspired by the phrase “WE WOULD SEE JESUS” (John 12:21) with Bishop Monnot facilitating.

Our task as SCFMD is to support the people in this church who help people show Jesus, even as many of us are directly involved in formation.

Our work as standing committee can be grouped into two key types: both **deadline-based work**, as set out in the SCFMD workplan and linked to our Blue Book report, which has a December 1, 2023, due date, and **work relevant to our ongoing purpose as the SCFMD**, which we look to pursue with energy and excitement. (We refer to our document from November, “What we are excited about”)

Facilitating the group’s discussion, B Monnot introduced a College of Congregational Development planning tool, “FROM/TO” statements. The group proceeded to formulate “FROM/TO” statements about both our **deadline-based work** and our **work relevant to our ongoing purpose**. SCFMD Leadership reminded the group that the Blue Book deadline is only one point in time, and that the SC and its work continues beyond that deadline. The bluebook timeline demands focused, time-realistic goals; our continuing work invites more expansive proposals.

STANDING COMMISSION ON LITURGY AND MUSIC

Members

Canon Mark Edw. Childers, Chair	Rio Grande, VII	2024
The Rev. Cynthia Black, Vice Chair	Newark, II	2027
The Rev. Stannard Baker, Secretary	Vermont, I	2024
Dr. Michael Boney	Colorado, VI	2024
Dr. Marty Burnett	Nebraska, VI	2027
Patrick Fennig	Connecticut, I	2027
Mr. Joshua Floberg	North Dakota, VI	2024
Kristina Frances, SSM	Massachusetts, I	2027
The Rev. Canon Robert Hino	Hawaii, VIII	2024
The Rt. Rev. Deon Johnson	Missouri, V	2027
The Rev. Greg Millikin	Chicago, V	2027
Mr. Ellis Montes	Texas, VII	2024
The Rt. Rev. Jennifer Reddall	Arizona, VIII	2024
Yuri Rodriguez	Indianapolis, V	2027
Brother Angel Roque	Rio Grande, VII	2024
The Rev. Cn. Susan Russell	Los Angeles, VIII	2027
Sr. José Santiago	Puerto Rico, II	2027
The Rt. Rev. Pierre Whalon	Convocation of Episcopal Churches in Europe, II	2024
The Rt. Rev. Terry White	Kentucky, IV	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024
The Rev. Kathleen Moore, Representative of the President of the House of Deputies	Northwestern Pennsylvania, III	2024
Dr. Liza Anderson, Liaison of Executive Council	Minnesota, VI	2024
The Rt. Rev. J. Neil Alexander, Custodian of the Book of Common Prayer	Atlanta, IV	2024

Changes in Membership

The Rt. Rev. E. Mark Stevenson left in November of 2022 and was replaced by The Rt. Rev. C. Andrew Doyle.

Representation at General Convention

Deputy Mark Childers is authorized to receive non-substantive amendments to this Report at the General Convention.

Mandate

2022 - Canon I.1.2.n.2

2. A Standing Commission on Liturgy and Music. The Custodian of the Book of Common Prayer shall be a member *ex officio* with voice, but without vote. It shall be the duty of the Commission to:

- i. Discharge such duties as shall be assigned to it by the General Convention as to policies and strategies concerning the common worship of this Church.
- ii. Collect, collate, and catalogue material bearing upon possible future revisions of the Book of Common Prayer.
- iii. Cause to be prepared and to present to the General Convention recommendations concerning the Lectionary, Psalter, and offices for special occasions as authorized or directed by the General Convention or House of Bishops.
- iv. Recommend to the General Convention authorized translations of the Holy Scripture from which the Lessons prescribed in the Book of Common Prayer are to be read.
- v. Receive and evaluate requests for consideration of individuals or groups to be included in the Calendar of the Church year and make recommendations thereon to the General Convention for acceptance or rejection.
- vi. Collect, collate, and catalogue material bearing upon possible future revisions of The Hymnal 1982 and other musical publications regularly in use in this Church, and encourage the composition of new musical materials.
- vii. Cause to be prepared and present to the General Convention recommendations concerning the musical settings of liturgical texts and rubrics, and norms as to liturgical music and the manner of its rendition.
- viii. At the direction of the General Convention, to serve the Church in matters pertaining to policies and strategies concerning Church music.
- ix. Collaborate with the Secretary of General Convention to make final edits to the text of resolutions adopted by General Convention that establish new or revised liturgical materials, and to arrange for their publication. For the sole purpose of this collaboration, members of the Standing Commission on Liturgy and Music are exempt from the terms of office set forth in I.1.2.b and shall remain in office until their successors are appointed and take office.
- x. Oversee and maintain the official liturgical website of The Episcopal Church through a subcommittee whose members shall include the Chair of the Standing Commission on Liturgy and Music or an authorized deputy who is a member of the Standing Commission on Liturgy and Music; the Custodian of the Standard Book of Common Prayer; at least one other Standing Commission on Liturgy and Music member; the Secretary of General Convention or an authorized deputy of the Secretary; a representative from the publisher affiliated with the Church Pension Fund; at least two members with skill in website design and coding, to be appointed by the Chair of the Standing Commission on Liturgy and Music.

Subcommittee on Accessibility, Inclusivity and Safety

Membership

The Rev. Canon Susan Russell, Chair	Los Angeles, VIII	2027
Mr. Joshua Floberg	North Dakota, VI	2024
The Rev. Dr. Cynthia Black	Newark, II	2027

Mandate

The following resolutions were referred to The Subcommittee on Accessibility, Inclusivity and Safety (AIS) from the 80th General Convention:

- C004 - Inclusion of June 19th, "Juneteenth" in the Church's Liturgical Calendar in Recognition of the End of Slavery in the United States
- B009 - Liturgy in response to mass shootings
- A005 -Translations of EOW and BOS into Spanish, French, and Haitian Kreyol
- C012 – Confronting Christian Zionism

Introduction and Summary

The AIS Subcommittee met in person in November of 2022, March of 2023, and October 2023 and periodically over Zoom.

The four resolutions referred to us were identified by the SCLM as falling into the categories of Accessibility, Inclusivity and Safety – issues identified by House of Deputies President Julia Ayala Harris as priorities for this biennium in her 2022 opening sermon/remarks. The report of the AIS Subcommittee includes responses to the four referred resolutions, and the proposal of a fifth resolution regarding resources and models for online/in person hybrid worship.

Additionally, the AIS Subcommittee affirms the work of the Subcommittee on Book of Common Prayer and the continuing process of prayer book revision to expand the vision of being a people of common prayer in a multi-lingual/multi-cultural world.

Response to B009 - Liturgy in response to mass shootings

Resolved, That the 80th General Convention direct the Standing Commission on Liturgy and Music to make available a liturgy to assist congregations and communities in responding pastorally to the Mass Shootings which are occurring at an alarming rate throughout the United States of America.

In response to Resolution B009, the Commission has added “Liturgy for Mass Shootings” to the resources made available to the church on the episcopalcommonprayer.com website.

Response to C004 - Inclusion of June 19th, "Juneteenth" in the Church's Liturgical Calendar in Recognition of the End of Slavery in the United States

A109 Commend and Expand Liturgical Resources in Recognition of the End of Slavery

Resolved, That the 81st General Convention commend the liturgical materials lamenting the historic evil of slavery and celebrating the emancipation of enslaved peoples on Juneteenth in the United States made available by the SCLM at episcopalcommonprayer.org; and be it further

Resolved, That the SCLM continue to develop liturgical materials in consultation with church leaders in nations, commonwealths, or convocations of churches where The Episcopal Church has dioceses or convocations and where slavery is a part of the national history; and be it further

Resolved, That the SCLM present these materials to the 82nd General Convention for consideration for inclusion in The Book of Occasional Services (or other appropriate location); and be it further

Resolved, That dioceses and congregations be encouraged to develop local commemorations lamenting slavery and its effects and celebrating emancipation on days deemed appropriate by them and to submit them to the SCLM through the portal on episcopalcommonprayer.org.

Response to A005 -Translations of EOW and BOS into Spanish, French, and Haitian Kreyol

After initial consultation with several of the stakeholders involved in previous translation efforts it became clear that the shortened timeframe of this biennium would not allow adequate time to do justice to this task. We propose continued consultation with stakeholders, including the Standing Commission on Liturgy and Music's Task Force for Liturgical Translations and the office of Latino/Hispanic ministry.

Response to C012 – Confronting Christian Zionism

A110 Clarify Distinction Between Biblical and Modern Israel

Resolved, That the 81st General Convention commits to making clear in liturgy and in teaching the distinction between Biblical and Modern Israel in Prayer Book liturgies and hymnody in order to reduce the confusion with the current State of Israel -- a conflation that reinforces the deceptive theology of Christian Zionism.

EXPLANATION

Modern Israel and Biblical Israel are two distinct entities, separated by thousands of years of history and significant geopolitical changes. Biblical Israel refers to the ancient kingdom of Israel – a theocratic nation of twelve tribes with its political and religious leaders closely intertwined. Modern Israel is a secular democratic state with a diverse society made up of various ethnic and religious groups

operating under a parliamentary system of government. Biblical and Modern Israel exist in completely different historical, cultural, and geopolitical contexts, with vastly different political and social systems.

Continuing and expanding the Church's online/hybrid presence

In addition to work on the four resolutions referred to us by the 80th General Convention, the AIS subcommittee proposes the following resolution to urge the church to continue to make online/hybrid worship available and to find ways to expand it, recognizing that those who are disabled or have mobility challenges, those with mental illness and those in long term care facilities have an opportunity to have access to a worshipping community in a way that they may never have had before.

A111 Develop resources and models for online/in person hybrid worship

Resolved, That the 81st General Convention of the Episcopal Church direct the Standing Commission on Liturgy and Music to develop resources and models for online/in person hybrid worship that reflect best practices, the variety of settings in which Episcopal churches are located and the technology, budgets and bandwidth available to them; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$50,000 during the triennium for the work outlined above.

EXPLANATION

An unanticipated opportunity of the COVID-19 pandemic was the almost immediate adoption of online/in person worship in a large percentage of Episcopal churches. In early 2020, because of government mandated lockdowns, churches chose Facebook, YouTube, Zoom and other modalities of online streaming as a way of continuing to worship. Many continue these practices today.

While the initial benefit may have been to gather the community that would have otherwise been physically present together, online, along with those members who because of geographical relocation had been unable to physically attend services, it was soon discovered that there was an additional benefit of making the worshipping community available to those in elder care locations, those with mental illness and those with mobility challenges and/or disabilities. The church found a new way to be the church, yet not all churches had ways to provide these streaming/online options.

As we gain some distance on the early days of the pandemic it is appropriate to ask ourselves if we are making the most of the resources we have, who has been left behind and what we might do better as we continue to share the love of God and build the Beloved Community.

This resolution would direct the Standing Commission on Liturgy and Music to identify models of hybrid online/in person worship that could be shared throughout the wider church. These resources would be reflective of budgetary limitations, bandwidth variations and overall user abilities. A task force would make these resources available on the episcopalcommonprayer.org website.

Proposed Resolutions

[A109 Commend and Expand Liturgical Resources in Recognition of the End of Slavery](#)

[A110 Clarify Distinction Between Biblical and Modern Israel](#)

[A111 Develop resources and models for online/in person hybrid worship](#)

Subcommittee on Book of Common Prayer

Members

The Rt. Rev. Jennifer Reddall, Chair	Arizona, VIII	2024
The Rt. Rev. J. Neil Alexander	Atlanta, IV	2024
The Rev. Stannard Baker	Vermont, I	2024
The Rt. Rev. Deon Johnson	Missouri, V	2027
The Rev. Greg Millikin	Chicago, V	2027
The Rev. Kathleen Moore	Northwestern Pennsylvania, III	2024

Changes in Membership

The Rt. Rev. C. Andrew Doyle

Mandate

The Subcommittee on The Book of Common Prayer was referred the following resolutions from the 80th General Convention:

- C018 Trial use of the “Expanded Revised Common Lectionary Daily Readings”
- D058 Trial Use of Alternative texts for Good Friday Liturgy with Revised Passion Gospel
- D061 Authorize Rite I in Contemporary Idiom for Trial Use
- D062 Affirm Flexibility of Idiom for Authorized Liturgies
- A015 Authorize Holy Eucharist, Rite II, Prayer C (Expansive Language) for Trial Use
- A057 Continuing Liturgical and Prayer Book Revision
- A058 Resolution on Official Liturgical Website for The Episcopal Church

In addition, due to the passage of an amended version of Article X of the Episcopal Church Constitution, the Subcommittee looked at what would be required if the amendment to Article X passed again at the 81st General Convention to move forward with approving a gender-neutral marriage liturgy for inclusion into The Book of Common Prayer.

Summary of Work

The Subcommittee met in person in November of 2022 and March of 2023, and at least monthly over Zoom.

The first five resolutions referred to us have developed into resolutions for the 81st General Convention to consider, which follow, and which follow the principles outlined in A057, Continuing Liturgical and Prayer Book Revision.

The final resolution referred to us, A058, focused on the development of www.episcopalcommonprayer.org as the official liturgical website for the Episcopal Church. This was work that our subcommittee took on with great enthusiasm. We believe it is a critical resource for our congregations, and are grateful to all those who have worked on informal liturgical websites and resources for our Church for so many years. We are particularly grateful to the following leaders who took the time to meet with us to help shape this offering to the church: Mr. Kelly Puckett (The Lectionary Page), the Rev. Gregory B. Johnston III (the Venite App), the Rev. Canon Scott Gunn (Forward Movement), and Mr. Scott Rands (www.episcopalchurch.org/lectionary).

This website is now going to be managed by the General Convention Office, under the oversight of the SCLM. We encourage its use as a resource for the clarification of the status of various liturgical resources, and for asking questions of the SCLM or submitting requests for liturgical resources.

Proposed Resolutions

A112 Authorize use of the "Expanded Revised Common Lectionary Daily Readings"

Resolved, That the 81st General Convention authorize for use the “Expanded Revised Common Lectionary Daily Readings,” prepared by the Consultation on Common Texts (CCT), for use until the 82nd General Convention, and be it further

Resolved, That the SCLM solicit, receive, and consider feedback during this triennium, to be reported to the 82nd General Convention.

A113 Affirm Flexibility of Idiom for Authorized Liturgies

Resolved, That Bishops be encouraged to permit Rite I liturgies to be adapted to the contemporary idiom.

EXPLANATION

The Book of Common Prayer (page 14) permits liturgies written in the contemporary idiom to be adapted to traditional language where necessary. This resolution encourages bishops to give permission to their clergy and congregations to do the opposite where desired.

A114 Authorize for use Expansive Language Versions of Eucharistic Prayer C

Resolved, That the 81st General Convention authorize The Holy Eucharist: Rite II, Prayer C, (Expansive Language) in two versions: dialogic and fixed response, for use throughout this church, subject to consent of the Bishop or the Ecclesiastical authority; and be it further

Resolved, That the period of authorized use of these texts shall extend to the 82nd General Convention; and be it further

Resolved, That the Holy Eucharist: Rite II, Eucharistic Prayer C, (Expansive Language) – both versions – be provided to the church at no cost via electronic distribution; and be it further

Resolved, That the Standing Commission on Liturgy and Music be directed to engage a dynamic equivalence translation of The Holy Eucharist: Rite II, Prayer C – both versions (Expansive Language) into the Spanish, French, and Kreyol languages; and be it further

Resolved, That the Standing Commission on Liturgy and Music be directed to develop a process for evaluation of the ongoing use of The Holy Eucharist: Rite II, Prayer C (Expansive Language) – both versions - among the dioceses and congregations of this church.

EXPLANATION

Resolution 2022-A015 stated that “The Holy Eucharist: Rite II, Eucharistic Prayer C, be referred to the Standing Commission on Liturgy and Music (SCLM) for possible revision...” This was a second referral, following GC79 in 2018. Resolution 2018-Do78 had directed the SCLM to “engage a dynamic equivalence translation of The Holy Eucharist: Rite II, including Eucharistic Prayers A, B, and D, (Expansive Language) into the Spanish, French, and Haitian Creole [Kreyol] languages.”

The SCLM first would like to reemphasize, in concurrence with Resolution 2022-A068, that Eucharistic Prayer C (1979) is memorialized as a rite of the Episcopal Church in the Book of Common Prayer, 1979. Between 2018 and 2022, the SCLM crafted two new expansive language versions of Eucharistic Prayer C:

- A dialogic-response version that maintains the 1979 Prayer C responses by the assembly in the anaphora (e.g. “Risen Lord, be known to us in the breaking of the bread.”)
- A fixed-response version that instead provides a consistent, antiphonal-style response: “Glory to God for ever and ever.”

Unchanged from 2022-A015 are the following distinguishing features:

The existence and proposal of a fixed-response version of Prayer C is to offer a version of the Eucharistic Prayer that both lends itself easily to being sung and/or set to music, while also providing a version intended for one who is worshipping without a physical liturgy at hand

Both versions also feature expansive language changes throughout the entire prayer, following the [Guidelines for Expansive and Inclusive Language](#) in liturgical creation, as adopted at GC80 as Resolution A060.

Both versions also restructure the anaphora to harmonize with the West Syrian structure of the other authorized Eucharistic prayers, in the form of the epiclesis following the words of institution, instead of prior (as in Alexandrian-structured 1979 Prayer C).

Furthermore, both versions now feature an epiclesis of the assembly, which was notably absent in the 1979 version of Prayer C.

The fixed-response version offers some further alternative language options throughout, compared to the dialogic-response version (ex. the fixed-response version's "Pour out your Spirit upon the whole earth..." versus the dialogic-response version's "God of our ancestors; Redeemer and Mother of Israel...")

The SCLM thoroughly reviewed both versions in the biennial period between GC80 and GC81. In addition to conversations and attempted new drafts, our task was to address the concerns shared by many in the Church over the phrase "you blessed us with memory, reason, and skill." In short, the pastoral and expansive language concerns are thus: this phrase as it stands limits God and the availability of God's blessing to all sorts of the human condition. In particular, the SCLM searched for an adaptation to this phrase that honors the experiences in creation of people with disabilities, those suffering from memory loss, and the like. The new phrasing, featured in both versions, now states "you blessed us with *the capacity for* memory, reason and skill."

Taking into consideration the multiple triennia of various scholars and theologians who have contributed to the changes to both versions of Prayer C, as well as the current SCLM's thorough vetting and review of the changes, we present these prayers now for approval by GC81 for trial use in the Episcopal Church.

The proposed revised texts for Rite II, Eucharistic Prayer C (Expanded Language) can be found as a supporting document to this resolution.

Support Document:

Eucharistic Prayer C – Dialogic (with rubrics)

In this prayer, the lines in bold are spoken by the People.

The Celebrant, whether bishop or priest, faces them and sings or says

[May] God be with you.

And also with you.

Lift up your hearts.

We lift them to the Lord.

Let us give thanks to the Lord our God.

It is right to give our thanks and praise.

Then, facing the Holy Table, the Celebrant proceeds

God of all power, Source and Sustainer of the Universe,
you are worthy of glory and praise.

Glory to you for ever and ever.

At your command all things came to be: shining light and enfolding dark;
the vast expanse of interstellar space, galaxies, suns,
and this fragile earth, our island home.

By your will they were created and have their being.

From the primal elements you brought forth the human race,
and blessed us with the capacity for memory, reason, and skill.

You made us the stewards of your creation.

But we turned against you, and betrayed your trust;
and we turned against one another.

Have mercy, Lord, for we are sinners in your sight.

Again and again, you called us to return.
Through prophets and sages you revealed your righteous Law.
And in the fullness of time you sent your eternal Word,
born of your servant Mary,
to fulfill your Law, opening for us the way of freedom and peace.
By his blood, he reconciled us. By his wounds, we are healed.

And therefore we praise you,
joining with the heavenly chorus,
with prophets, apostles, and martyrs,
and with all those in every generation who have looked to you in hope,
to proclaim with them your glory, in their unending hymn:

Celebrant and People

**Holy, holy, holy Lord, God of power and might,
heaven and earth are full of your glory.
Hosanna in the highest.
Blessed is the one who comes in the name of the Lord.
Hosanna in the highest.**

At the following words concerning the bread, the Celebrant is to hold it, or lay a hand upon it; and at the words concerning the cup, to hold or place a hand upon the cup and any other vessel containing wine to be consecrated.

On the night he was betrayed Jesus took bread, said the blessing,
broke the bread, and gave it to his friends, and said, “Take, eat:
This is my Body, which is given for you. Do this for the remembrance of me.”

After supper, Jesus took the cup of wine, gave thanks, and said,
“Drink this, all of you: This is my Blood of the new Covenant,
which is shed for you and for all for the forgiveness of sins.
Whenever you drink it, do this for the remembrance of me.”

Remembering now his work of redemption
and offering to you this sacrifice of thanksgiving,
We celebrate Christ’s death and resurrection as we await the day of his coming.

Therefore, O God, we who have been redeemed by Jesus Christ,
and made a new people by water and the Spirit, now bring before you these gifts.
Sanctify them by your Holy Spirit
to be the Body and Blood of Jesus Christ our Savior.

Sanctify us also,
and let the grace of this Holy Communion make us one body,
one spirit in Christ, that we may worthily serve the world in his name.
Risen Lord, be known to us in the breaking of the Bread.

God of our ancestors; Redeemer and Mother of Israel;
God and Father of our Lord Jesus Christ:
Open our eyes to see your hand at work in the world about us.
Deliver us from the presumption of coming to this Table for solace only
and not for strength; for pardon only and not for renewal.

Accept these prayers and praises, Almighty God,
through Jesus Christ our great High Priest,
to whom, with you and the Holy Spirit,
your Church gives honor, glory, and worship,
from generation to generation. **AMEN.**

Continue with the Lord's Prayer on p. 364

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Eucharistic Prayer C – Fixed-Response (with rubrics)

In this prayer, the lines in bold are spoken by the People.

The Celebrant, whether bishop or priest, faces them and sings or says

The Lord be with you (or) God be with you.

And also with you.

Lift up your hearts.

We lift them to the Lord.

Let us give thanks to the Lord our God.

It is right to give our thanks and praise.

Then, facing the Holy Table, the Celebrant proceeds

It is right to give you thanks and praise,

O Lord, our God, sustainer of the universe.

Glory to you for ever and ever.

At your command all things came to be: shining light and enfolding dark;
the vast expanse of interstellar space, galaxies, suns, the planets in their courses,
and this fragile earth, our island home;
by your will they were created and have their being.
From the primal elements you brought forth the human race,
and blessed us with the capacity for memory, reason, and skill;
you made us the stewards of your creation.

Glory to you for ever and ever.

But we turned against you, and betrayed your trust;
and we turned against one another.
Again and again you called us to return.
Through prophets and sages you revealed your righteous law.
In the fullness of time you sent your Son,
born of a woman, to be our Savior.
He was wounded for our transgressions, and bruised for our iniquities.
By his death he opened to us the way of freedom and peace.

Glory to you for ever and ever.

Therefore we praise you,
joining with the heavenly chorus, with prophets, apostles, and martyrs,
and with those in every generation who have looked to you in hope,
to proclaim with them your glory, in their unending hymn:

Celebrant and People

**Holy, holy, holy Lord, God of power and might,
heaven and earth are full of your glory.
Hosanna in the highest.**

Blessed is the one who comes in the name of the Lord.

Hosanna in the highest.

The people stand or kneel.

At the following words concerning the bread, the Celebrant is to hold it, or lay a hand upon it; and at the words concerning the cup, to hold or place a hand upon the cup and any other vessel containing wine to be consecrated.

Blessed are you, Lord our God, for sending us Jesus, the Christ,
who on the night he was handed over to suffering and death,
took bread, said the blessing, broke the bread, gave it to his friends,
and said, “Take, eat: this is my body which is given for you.
Do this for the remembrance of me.”

In the same way, after supper, he took the cup of wine;
he gave you thanks, and said, “Drink this, all of you:
this is my blood of the new covenant,
which is shed for you and for all for the forgiveness of sins.
Whenever you drink it, do this for the remembrance of me.”

Remembering now his work of redemption,
and offering to you this sacrifice of thanksgiving,
we celebrate his death and resurrection, as we await the day of his coming.

Glory to you for ever and ever.

Therefore, we who have been redeemed by Jesus Christ,
and made a new people by water and the Spirit, now bring before you these gifts.
Sanctify them by your Holy Spirit

to be the Body and Blood of Jesus Christ our Savior.

Sanctify us also,

and let the grace of this Holy Communion make us one body,
one spirit in Christ, that we may worthily serve the world in his name.

Glory to you for ever and ever.

Pour out your Spirit upon the whole earth

and make it your new creation.

Gather your Church together

from the ends of the earth into your kingdom,

where peace and justice are revealed,

that we, with all your people,

of every language, race, and nation,

may share the banquet you have promised.

Through Christ, with Christ, and in Christ,

all honor and glory are yours, creator of all.

Glory to you for ever and ever. AMEN.

Continue with the Lord's Prayer on p. 364

A115 Authorized use of alternative texts for the Good Friday liturgy

Resolved, That the 81st General Convention, authorize for use until the 82nd General Convention, with the consent of the Bishop or the Ecclesiastical authority, the alternative texts for the Good Friday Liturgy for use throughout the church, with the consent of the ecclesiastical authority; be it further

Resolved, That the alternative texts for the Good Friday Liturgy, be provided to the church at no cost via electronic distribution; and be it further

Resolved, That the Standing Commission on Liturgy and Music be directed to engage a dynamic equivalence translation of the alternative texts for the Good Friday liturgy into Spanish, French, and Kreyol languages; and be it further

Resolved, That the Standing Commission on Liturgy and Music be directed to develop a process for evaluation of the ongoing use of the alternative texts for the Good Friday liturgy among the dioceses and congregations of this church.

EXPLANATION

The history of anti-Jewish violence rooted in the misunderstanding and misuse of the Good Friday liturgy calls us to be exceptionally sensitive to concerns about language that in our current time is perceived as anti-Jewish or anti-Semitic. The alternative texts of the Good Friday liturgy attempt to honor the existing covenant between God and the Jewish people, and the dignity of those for whom we pray.

Support Documents:

Alternative Texts for the Good Friday Liturgy

On this day the ministers enter in silence.

All then kneel for silent prayer, after which the Celebrant stands and begins the liturgy with the Collect of the Day.

Immediately before the Collect, the Celebrant may say

Blessed be our God.

People **For ever and ever. Amen.**

Let us pray.

Almighty God, we pray you graciously to behold this your family, for whom our Lord Jesus Christ was willing to be betrayed, and given into the hands of sinners, and to suffer death upon the cross; who now lives and reigns with you and the Holy Spirit, one God, for ever and ever. Amen.

Old Testament Isaiah 52:13-53:12

Psalm 22

Epistle Ephesians 1:3-14 or Hebrews 4:14-16; 5:7-9

The Passion Gospel is announced in the following manner

The Passion of our Lord Jesus Christ according to John.

The customary responses before and after the Gospel are omitted.

John 18:1-19:42 or 19:1-42

The Passion Gospel may be read or chanted by lay persons. Specific roles may be assigned to different persons, the congregation taking the part of the crowd. Care to explain the meaning of the term “the Jews” in the Passion Gospel is the duty of the leaders of the service.

The congregation may be seated for the first part of the Passion. At the verse which mentions the arrival at Golgotha (John 19:17) all stand.

The Sermon follows.

A hymn may then be sung.

The Solemn Collects

All standing, the Deacon, or other person appointed, says to the people

Dear People of God: Our heavenly Father sent his Son into the world, not to condemn the world, but that the world through him might be saved; that all who believe in him might be delivered from the power of sin and death, and become heirs with him of everlasting life.

We pray, therefore, for people everywhere according to their needs.

In the biddings which follow, the indented portions may be adapted by addition or omission, as appropriate, at the discretion of the Celebrant.

The people may be directed to stand or kneel.

The biddings may be read by a Deacon or other person appointed. The Celebrant says the Collects.

Let us pray for the holy Catholic Church of Christ throughout the world;

For its unity in witness and service

For all bishops and other ministers

and the people whom they serve

For N., our Bishop, and all the people of this diocese

For all Christians in this community

For those about to be baptized (particularly _____)

That God will confirm his Church in faith, increase it in love, and preserve it in peace.

Silence

Almighty and everlasting God, by whose Spirit the whole body of your faithful people is governed and sanctified: Receive our supplications and prayers which we offer before you for all members of your holy Church, that in their vocation and ministry they may truly and devoutly serve you; through our Lord and Savior Jesus Christ. *Amen.*

Let us pray for all nations and peoples of the earth, and for those in authority among them;

For N., the President of the United States.

For the Congress and the Supreme Court

For the Members and Representatives of the United Nations

For all who serve the common good

That by God's help they may seek justice and truth, and live in peace and concord.

Silence

Almighty God, kindle, we pray, in every heart the true love of peace, and guide with your wisdom those who take counsel for the nations of the earth; that in tranquility your dominion may increase, until the earth is filled with the knowledge of your love; through Jesus Christ our Lord. *Amen.*

Let us pray for the Jewish people, who by the grace of their eternal covenant with God were delivered from bondage into freedom;

For their continued faithfulness;

For their flourishing in peace as witnesses to God's sustaining love;

For their safety from all malice and harm

For their liberation from all forms of antisemitism and hatred

For the fullness of redemption for the sake of God's Name.

That unity and concord may exist between Jews and Christians, in obedience to God's will.

Silence

O God of Abraham and Sarah, you planted your people Israel as the root and grafted all peoples as wild branches into a single olive tree of praise to you: As we come near to the cross, we lament Christian acts of prejudice and violence against your faithful people, of whom Jesus Christ was born. Bless the children of your covenant, so that together we may attain the fullness of your blessing for the world. Amen.

Let us pray for all who suffer and are afflicted in body or in mind;

For those who are hungry and homeless, destitute and oppressed

For those who are ill or disabled, in body, mind, or spirit

For those who are lonely, fearful or anguished

For those who face temptation, doubt, and despair

For those who are sorrowful and bereaved

For those who are prisoners, refugees, and captives

For those who are victims of war, genocide, and trafficking; and all those in mortal danger

For those who are persecuted for the sake of Christ

That God in his mercy will comfort and relieve them, and grant them the knowledge of his love, and stir up in us the will and patience to minister to their needs.

Silence

Gracious God, the comfort of all who sorrow, the strength of all who suffer: Let the cry of those in misery and need come to you, that they may find your mercy present with them in all their afflictions; and give us, we pray, the strength to serve them for the sake of him who suffered for us, your Son Jesus Christ our Lord. Amen.

Let us pray for those who have not embraced God's redemptive love.

For those who have never heard the word of salvation

For those who have lost their faith

For those hardened by sin and indifference

For the contemptuous and the scornful

For those who are persecutors of Christ's disciples

For those who in the name of Christ have persecuted others

That God will open their hearts to truth, and lead them to faith and obedience.

Silence

Merciful God, creator of all the peoples of the earth and lover of souls: Have compassion on all who do not know you; let the Good News of your salvation be preached with grace and power to those who have not heard it; turn the hearts of those who resist it; and bring home to your fold those who have gone astray; that there may be one flock under one shepherd, Jesus Christ our Lord. Amen.

Let us commit ourselves to God, and pray for the grace of a holy life, that, with all who have departed this world and have died in the peace of Christ, and those whose faith is known to God alone, we may be accounted worthy to enter into the fullness of the joy of our Lord, and receive the crown of life in the day of resurrection.

Silence

O God of unchangeable power and eternal light: Look favorably on your whole Church, that wonderful and sacred mystery; by the effectual working of your providence, carry out in tranquility the plan of salvation; let the whole world see and know that things which were cast down are being raised up, and things which had grown old are being made new, and that all things are being brought to their perfection by him through whom all things were made, your Son Jesus Christ our Lord; who lives and reigns with you, in the unity of the Holy Spirit, one God, for ever and ever. Amen.

The service may be concluded here with the singing of a hymn or anthem, the Lord's Prayer, and the final prayer of this service.

If desired, a wooden cross may now be brought into the church and placed in the sight of the people.

Appropriate devotions may follow, which may include any or all of the following, or other suitable anthems. If the texts are recited rather than sung, the congregation reads the parts in italics.

Anthem 1

We glory in your cross, O Lord,
*and praise and glorify your holy resurrection;
for by virtue of your cross
joy has come to the whole world.*

May God be merciful to us and bless us,
show us the light of his countenance, and come to us.

*Let your ways be known upon earth,
your saving health among all nations.*

Let the peoples praise you, O God;
let all the peoples praise you.

*We glory in your cross, O Lord,
and praise and glorify your holy resurrection;
for by virtue of your cross
joy has come to the whole world.*

Anthem 2

We adore you, O Christ, and we bless you,
because by your holy cross you have redeemed the world.

If we have died with him, we shall also live with him; if we endure, we shall also reign with him.

*We adore you, O Christ, and we bless you,
because by your holy cross you have redeemed the world.*

Anthem 3

O Savior of the world,
who by thy cross and precious blood hast redeemed us:
Save us and help us, we humbly beseech thee, O Lord.

The hymn "Sing, my tongue, the glorious battle," or some other hymn extolling the glory of the cross, is then sung.

The service may be concluded here with the Lord's Prayer and the final prayer below.

In the absence of a bishop or priest, all that precedes may be led by a deacon or lay reader.

In places where Holy Communion is to be administered from the reserved Sacrament, the following order is observed

A Confession of Sin

The Lord's Prayer

The Communion

The service concludes with the following prayer. No blessing or dismissal is added.

Lord Jesus Christ, Son of the living God, we pray you to set your passion, cross, and death between your judgment and our souls, now and in the hour of our death. Give mercy and grace to the living; pardon and rest to the dead; to your holy Church peace and concord; and to us sinner everlasting life and glory; for with the Gather and the Holy Spirit you live and reign, one God, now and for ever. Amen.

NOTES

- The options for the reading from the epistles are designed to provide alternative perspectives on the meaning of the death of Jesus Christ. The traditional first reading from the Letter to the Hebrews frames the death of Jesus as the final sacrifice offered to God. Jesus Christ becomes both the sacrifice and the high priest offering the sacrifice. The first alternative reading from the Letter to the Ephesians situates the death of Jesus Christ within a larger arc of salvation history. God the Father chose his Son before creation to be for humans the means by which they attain redemption as children of God. This happens through the death of Jesus Christ, which secures the forgiveness of sins. The second alternate reading is the same as in the existing prayer book rite. The image on Jesus Christ as an interceding high priest does not call into question the validity of the Temple sacrifices given by God to the Jewish people to offer as worship. The source of salvation rests in Christ's obedience to God the Father, which those who follow Christ call upon for their own salvation.
- For the reading of the Passion from the Gospel of John, this liturgy provides an option for shortening the reading to John 19:1-42. This reading leaves out parts of the narrative that have historically been used to charge all Jewish people as guilty for the death of Jesus.
- For the Passion Gospel, the SCLM recommends that congregations explore using approved translations of Scripture, including the Common English Bible and the New International Version, that refer to Jesus' opponents as "the Jewish leaders" rather than "the Jews."
- This alternate rite introduces a new collect for the Jewish people. Historically, the church prayed on Good Friday that Jews, who had been blamed for the death of Jesus, would convert from their blindness and hardness of heart. While such a prayer has never been in the Episcopal Church's Book of Common Prayer, it is a legacy to which we are accountable, given that it at times inspired violence against Jews. In our own time, Christian churches have begun to repair their relationship with the Jewish people, including offering prayers on Good Friday that affirm God's relationship with the Jewish people. Notably, the Anglican Church of Canada and the Church of England have such prayers. This solemn collect contains some of the themes found in these recent prayers. It grounds God's redemptive work as beginning with the Jewish people from whom Jesus Christ was born. This collect states that God's covenant with the Jewish people has never been broken and prays for their continued flourishing and safety as witnesses to God. This collect concludes with an acknowledgment of Christian harm done to

the Jewish people and envisions a new life where Jews and Christians walk together in the life of God for the sake of the world.

- The Collect for those who suffer has been revised with person first language, an approach that ensures that those who experience various conditions are not defined by those exclusively. Additionally, some new categories that have emerged within the collective consciousness of the church over the past several decades have been added. A specific petition for persecuted Christians has been added as a reminder that globally many still suffer for Christ's sake.
- The final Solemn Collect retains the original petitions but its bidding and conclusion have been revised from the current rite. This collect does not frame the possibility of redemption solely within an acceptance of the Gospel, but as a question of how people respond to the work of the Triune God. The human failings named in this petition are measured in terms of loving responses to God in the world, whether within or outside the church. The final prayer especially names the importance for Christians to make amends for sins committed even as it hopes that all people may turn to God.
- Concerning devotions before the cross and anthems sung at this time, a word of caution must be given regarding the custom of using the *Improperia* or Reproaches. Although these are not found within the Good Friday liturgy or other approved rites, it has been a custom in some settings to use them. Because of the heavily anti-Jewish content of their language, their use is inadvisable.

A116 Marriage Rites for Inclusion in the Book of Common Prayer (First Reading)

Resolved, That the Rites for The Celebration and Blessing of a Marriage, as authorized for trial use by the 79th General Convention, be included in the Book of Common Prayer; and be it further

Resolved, the 1979 Book of Common Prayer, having been memorialized as the Prayer Book of this church, (2018 – A068), shall remain accessible to our members and our mission.

Support Documents:

THE CELEBRATION AND BLESSING OF A MARRIAGE

Concerning the Service

At least one of the parties must be a baptized Christian; the ceremony must be attested by at least two witnesses; and the marriage must conform to the laws of the State.

A priest or a bishop normally presides at the Celebration and Blessing of a Marriage, because such ministers alone have the function of pronouncing the nuptial blessing, and of celebrating the Holy Eucharist.

When both a bishop and a priest are present and officiating, the bishop should pronounce the blessing and preside at the Eucharist.

A deacon, or an assisting priest, may deliver the charge, ask for the Declaration of Consent, read the Gospel, and perform other assisting functions at the Eucharist.

Where it is permitted by civil law that deacons may perform marriages, and no priest or bishop is available, a deacon may use the service which follows, omitting the nuptial blessing which follows The Prayers.

It is desirable that the Lessons from the Old Testament and the Epistles be read by lay persons.

In the opening exhortation (at the symbol of *N. N.*), the full names of the persons to be married are declared. Subsequently, only their Christian names are used.

Additional Directions are on page XXX.

The Celebration and Blessing of a Marriage

At the time appointed, the persons to be married, with their witnesses, assemble in the church or some other appropriate place.

During their entrance, a hymn, psalm, or anthem may be sung, or instrumental music may be played.

Then the Celebrant, facing the people and the persons to be married, addresses the congregation and says

Dearly beloved: We have come together in the presence of God to witness and bless the joining together of N. and N. in Holy Matrimony. The joining of two people in a life of mutual fidelity signifies to us the mystery of the union between Christ and his Church, and so it is worthy of being honored among all people.

The union of two people in heart, body, and mind is intended by God for their mutual joy; for the help and comfort given one another in prosperity and adversity; and, when it is God's will, for the gift of children and their nurture in the knowledge and love of the Lord.

Therefore marriage is not to be entered into unadvisedly or lightly, but reverently, deliberately, and in accordance with the purposes for which it was instituted by God.

Into this holy union N. N. and N. N. now come to be joined.

If any of you can show just cause why they may not lawfully be married, speak now; or else for ever hold your peace.

Then the Celebrant says to the persons to be married

I require and charge you both, here in the presence of God, that if either of you knows any reason why you may not be united in marriage lawfully, and in accordance with God's Word, you do now confess it.

The Declaration of Consent

The Celebrant says to one member of the couple, then to the other

N., will you have this woman/man/person to be your wife/husband/spouse; to live together in the covenant of marriage? Will you love her/him, comfort her/him, honor and keep her/him, in sickness and in health; and, forsaking all others, be faithful to her/him as long as you both shall live?

Answer I will.

The Celebrant then addresses the congregation, saying

Will all of you witnessing these promises do all in your power to uphold these two persons in their marriage?

People We will.

If there is to be a presentation or a giving in marriage, it takes place at this time. See Additional Directions, p. 104.

A hymn, psalm, or anthem may follow.

The Ministry of the Word

The Celebrant then says to the people

The Lord be with you.

People

And also with you.

Celebrant Let us pray.

O gracious and everliving God, you have created humankind in your image: Look mercifully upon N. and N. who come to you seeking your blessing, and assist them with your grace, that with true fidelity

and steadfast love they may honor and keep the promises and vows they make; through Jesus Christ our Savior, who lives and reigns with you in the unity of the Holy Spirit, one God, for ever and ever. Amen.

Then one or more of the following passages from Holy Scripture is read. Other readings from Scripture suitable for the occasion may be used. If there is to be a Communion, a passage from the Gospel always concludes the Readings.

Genesis 1:26–28 (*Male and female he created them*)
Song of Solomon 2:10–13; 8:6–7 (*Many waters cannot quench love*)
Tobit 8:5b–8 (*New English Bible*) (*That she and I may grow old together*)
1 Corinthians 13:1–13 (*Love is patient and kind*)
Ephesians 3:14–19 (*The Father from whom every family is named*)
Ephesians 5:1–2 (*Walk in love, as Christ loved us*)
Colossians 3:12–17 (*Love which binds everything together in harmony*)
1 John 4:7–16 (*Let us love one another, for love is of God*)

Between the Readings, a psalm, hymn, or anthem may be sung or said. Appropriate psalms are Psalm 67, Psalm 127, and Psalm 128.

When a passage from the Gospel is to be read, all stand, and the Deacon or Minister appointed says

The Holy Gospel of our Lord Jesus Christ according to _____.

People Glory to you, Lord Christ.

Matthew 5:1–10 (*The Beatitudes*)
Matthew 5:13–16 (*You are the light...Let your light so shine*)
Matthew 7:21, 24–29 (*Like a wise man who built his house upon the rock*)
John 15:9–12 (*Love one another as I have loved you*)

After the Gospel, the Reader says

The Gospel of the Lord.

People Praise to you, Lord Christ.

A homily or other response to the Readings may follow.

The Marriage

Each member of the couple, in turn, takes the right hand of the other and says

In the Name of God, I, N., take you, N.,
to be my wife/husband/spouse,
to have and to hold from this day forward,
for better for worse, for richer for poorer,
in sickness and in health, to love and to cherish,
until we are parted by death.
This is my solemn vow.

The Priest may ask God's blessing on rings as follows

Bless, O Lord, these rings to be signs of the vows by which N. and N. have bound themselves to each other; through Jesus Christ our Lord. Amen.

The giver places the ring on the ring finger of the other's hand and says

N., I give you this ring as a symbol of my vow,
and with all that I am, and all that I have, I honor you,
in the Name of the Father, and of the Son,
and of the Holy Spirit [or in the Name of God].

Then the Celebrant joins the right hands of the couple and says

Now that N. and N. have given themselves to each other by solemn vows, with the joining of hands and the giving and receiving of rings, I pronounce that they are wed to one another, in the Name of the Father, and of the Son, and of the Holy Spirit. Those whom God has joined together let no one put asunder.

People Amen.

The Prayers

All standing, the Celebrant says

Let us pray together in the words our Savior taught us.

People and Celebrant

Our Father, who art in heaven, Our Father in heaven,
hallowed be thy Name, hallowed be your Name,
thy kingdom come, your kingdom come,
thy will be done, your will be done,

on earth as it is in heaven. on earth as in heaven.

Give us this day our daily bread. Give us today our daily bread.

And forgive us our trespasses, Forgive us our sins

as we forgive those as we forgive those

who trespass against us. who sin against us.

And lead us not into temptation, Save us from the time of trial,
but deliver us from evil. and deliver us from evil.

For thine is the kingdom, For the kingdom, the power,
and the power, and the glory, and the glory are yours,
for ever and ever. Amen. now and for ever. Amen.

If Communion is to follow, the Lord's Prayer may be omitted here.

The Deacon or other person appointed reads the following prayers, to which the People respond, saying, Amen. If there is not to be a Communion, one or more of the prayers may be omitted.

Leader Let us pray.

Eternal God, creator and preserver of all life, author of salvation, and giver of all grace: Look with favor upon the world you have made, and for which your Son gave his life, and especially upon N. and N. whom you make one flesh in Holy Matrimony. Amen.

Give them wisdom and devotion in the ordering of their common life, that each may be to the other a strength in need, a counselor in perplexity, a comfort in sorrow, and a companion in joy. Amen.

Grant that their wills may be so knit together in your will, and their spirits in your Spirit, that they may grow in love and peace with you and one another all the days of their life. Amen.

Give them grace, when they hurt each other, to recognize and acknowledge their fault, and to seek each other's forgiveness and yours. *Amen.*

Make their life together a sign of Christ's love to this sinful and broken world, that unity may overcome estrangement, forgiveness heal guilt, and joy conquer despair. *Amen.*

Bestow on them, if it is your will, the gift and heritage of children, and the grace to bring them up to know you, to love you, and to serve you. *Amen.*

Give them such fulfillment of their mutual affection that they may reach out in love and concern for others. *Amen.*

Grant that all married persons who have witnessed these vows may find their lives strengthened and their loyalties confirmed. *Amen.*

Grant that the bonds of our common humanity, by which all your children are united one to another, and the living to the dead, may be so transformed by your grace, that your will may be done on earth as it is in heaven; where, O Father, with your Son and the Holy Spirit, you live and reign in perfect unity, now and for ever. *Amen.*

The Blessing of the Marriage

The People remain standing. The couple kneel, and the Priest says one of the following prayers

Most gracious God, we give you thanks for your tender love in sending Jesus Christ to come among us, to be born of a human mother, and to make the way of the cross to be the way of life. We thank you, also, for consecrating the union of two people in his Name. By the power of your Holy Spirit, pour out the abundance of your blessing upon N. and N. Defend them from every enemy. Lead them into all peace. Let their love for each other be a seal upon their hearts, a mantle about their shoulders, and a crown upon their foreheads. Bless them in their work and in their companionship; in their sleeping and in their waking; in their joys and in their sorrows; in their life and in their death. Finally, in your mercy, bring them to that table where your saints feast for ever in your heavenly home; through Jesus Christ our Lord, who with you and the Holy Spirit lives and reigns, one God, for ever and ever. *Amen.*

or this

O God, you have so consecrated the covenant of marriage that in it is represented the spiritual unity between Christ and his Church: Send therefore your blessing upon these your servants, that they may so love, honor, and cherish each other in faithfulness and patience, in wisdom and true godliness, that

their home may be a haven of blessing and peace; through Jesus Christ our Lord, who lives and reigns with you and the Holy Spirit, one God, now and for ever. Amen.

The couple still kneeling, the Priest adds this blessing

God the Father, God the Son, God the Holy Spirit, bless, preserve, and keep you; the Lord mercifully with his favor look upon you, and fill you with all spiritual benediction and grace; that you may faithfully live together in this life, and in the age to come have life everlasting. Amen.

The Peace

The Celebrant may say to the People

The peace of the Lord be always with you.

People And also with you.

The newly married couple then greet each other, after which greetings may be exchanged throughout the congregation.

When Communion is not to follow, the wedding party leaves the church. A hymn, psalm, or anthem may be sung, or instrumental music may be played.

At the Eucharist

The liturgy continues with the Offertory, at which the newly married couple may present the offerings of bread and wine.

Preface of the Season

At the Communion, it is appropriate that the newly married couple receive Communion first, after the ministers. In place of the usual post communion prayer, the following is said

O God, the giver of all that is true and lovely and gracious:

We give you thanks for binding us together

in these holy mysteries of the Body and Blood of your Son Jesus Christ.
Grant that by your Holy Spirit,
N. and N., now joined in Holy Matrimony,
may become one in heart and soul,
live in fidelity and peace,
and obtain those eternal joys prepared for all who love you;
for the sake of Jesus Christ our Lord. Amen.

As the wedding party leaves the church, a hymn, psalm, or anthem may be sung, or instrumental music may be played.

THE BLESSING OF CIVIL MARRIAGE

The rite begins as prescribed for celebrations of the Holy Eucharist, using the Collect and Lessons appointed in the Marriage service.

After the Gospel (and homily), the couple stand before the Celebrant, who addresses them in these or similar words

N. and N., you have come here today to seek the blessing of God and of his Church upon your marriage. I require, therefore, that you promise, with the help of God, to fulfill the obligations which Christian Marriage demands.

The Celebrant then addresses one member of the couple, then the other, saying

N., you have taken N. to be your wife/husband/spouse. Do you promise to love her/him, comfort her/him, honor and keep her/him, in sickness and in health, and, forsaking all others, to be faithful to her/him as long as you both shall live?

Answer I do.

The Celebrant then addresses the congregation, saying

Will you who have witnessed these promises do all in your power to uphold these two persons in their marriage?

People We will.

If rings are to be blessed, the members of the couple extend their hands toward the Priest [or Bishop], who says

Bless, O Lord, these rings to be signs of the vows by which N. and N. have bound themselves to each other; through Jesus Christ our Lord. Amen.

The Celebrant joins the right hands of the couple and says

Those whom God has joined together let no one put asunder.

People Amen.

The service continues with The Prayers on page 104.

AN ORDER OF MARRIAGE

If it is desired to celebrate a marriage otherwise than as provided on pages 76-85 of “Liturgical Resources 1: The Witnessing and Blessing of a Lifelong Covenant (revised and expanded),” this Order is used.

Normally, the Celebrant is a priest or bishop. Where permitted by civil law, and when no priest or bishop is available, a deacon may function as celebrant, but does not pronounce a nuptial blessing.

The laws of the State having been complied with, the couple, together with their witnesses, families, and friends assemble in the church or in some other convenient place.

1. The teaching of the Church concerning Holy Matrimony, as it is declared in the formularies, is briefly stated.
2. The intention of the two to enter the state of matrimony, and their free consent, is publicly ascertained.
3. One or more Readings, one of which is always from Holy Scripture, may precede the exchange of vows. If there is to be a Communion, a Reading from the Gospel is always included.
4. The vows are exchanged, using the following form

In the Name of God,
I, N., take you, N., to be my *wife/husband/spouse*,
to have and to hold from this day forward,
for better for worse, for richer for poorer,

in sickness and in health, to love and to cherish,
until we are parted by death.
This is my solemn vow.

or this

I, N., take thee N.,
to my wedded *wife/husband/spouse*,
to have and to hold from this day forward,
for better for worse, for richer for poorer,
in sickness and in health, to love and to cherish,
till death us do part, according to God's holy ordinance;
and thereto I plight [*or give*] thee my troth.

5. The Celebrant declares the union of the couple, in the Name of the Father, and of the Son, and of the Holy Spirit.
6. Prayers are offered for the couple, for their life together, for the Christian community, and for the world.
7. A priest or bishop pronounces a solemn blessing upon the couple.
8. If there is no Communion, the service concludes with the Peace, the couple first greeting each other. The Peace may be exchanged throughout the assembly.
9. If there is to be a Communion, the service continues with the Peace and the Offertory. The Holy Eucharist may be celebrated either according to Rite One or Rite Two, or according to the Order on page 401 of the Book of Common Prayer 1979.

Additional Directions

If Banns are to be published, the following form is used

I publish the Banns of Marriage between N. N. of and N. N. of .

If any of you know just why they may not be joined together in Holy Matrimony, you are bidden to declare it. This is the first [*or second, or third*] time of asking.

The Celebration and Blessing of a Marriage may be used with any authorized liturgy for the Holy Eucharist. This service then replaces the Ministry of the Word, and the Eucharist begins with the Offertory.

After the Declaration of Consent, if there is to be a giving in marriage, or presentation, the Celebrant asks, Who presents [gives] these two people to be married to each other?

The appropriate answer is, “I do.” If more than one person responds, they do so together.

For the Ministry of the Word it is fitting that the couple to be married remain where they may conveniently hear the reading of Scripture. They may approach the Altar, either for the exchange of vows, or for the Blessing of the Marriage.

It is appropriate that all remain standing until the conclusion of the Collect. Seating may be provided for the wedding party, so that all may be seated for the Lessons and the homily.

The Apostles’ Creed may be recited after the Lessons, or after the homily, if there is one. When desired, some other suitable symbol of the vows may be used in place of the ring.

At the Offertory, it is desirable that the bread and wine be presented to the ministers by the newly married persons. They may then remain before the Lord’s Table and receive Holy Communion before other members of the congregation.

Prefaces for Marriage

Note: The following Proper Preface is proposed for trial use as an addition to the Prefaces for Rites I and II, BCP p. 381.

Because in the union of two people in faithful love, we are bound in joy to our Savior Christ; who in his own offering of love makes the whole creation new.

Note: These paragraphs are proposed for trial use as an amendment of the section on Holy Matrimony in An Outline of the Faith (also known as the Catechism), BCP p. 861.

Q. What is Holy Matrimony?

A. Holy Matrimony is Christian marriage, in which two people enter into a life-long union, make their vows before God and the Church, and receive the grace and blessing of God to help them fulfill their vows.

Q. What is required of those to be married?

A. It is required of those to be married that at least one member of the couple be baptized and that they have been instructed that Christian marriage is an unconditional, mutual, exclusive, faithful and

lifelong commitment intended for the couple's mutual joy, for the help and comfort given to each other in prosperity and adversity, and when it is God's will, for the gift and heritage of children and their nurture in the knowledge and love of God.

Subcommittee on Calendar

Members

Dr. Liza Anderson, Chair	Minnesota, VI	2024
Kristina Frances, SSM	Massachusetts, I	2027
The Rev. Canon Robert Hino	Hawaii, VIII	2024
Brother Angel Roque	Rio Grande, VII	2024

Summary of Work

The Calendar of the Episcopal Church seems to be finally reaching a state of equilibrium. This is the first time since 2003 when the Subcommittee on the Calendar has not been tasked with any major or dramatic revisions. Consequently, we were able to address some deferred maintenance on aspects of the calendar that have languished in recent years.

We also spent a very significant amount of time this biennium typing everything from *Lesser Feasts and Fasts* into spreadsheets. This is admittedly not the kind of glamorous liturgical work that is likely to win us any great accolades or acclaim, but we nevertheless hope that it will be a significant help to future iterations of the calendar committee.

Lectionary Revisions

Given the shortened timeline of this biennium, most of our energy has been focused on revisions to the lectionary. Because normally each commemoration is individually prepared by its proposers, sometimes significant repetitions within the lectionary have occurred. We identified instances where the same passage recurred three or four times within a given week, or as many as seventeen times within a year. While we love Romans 8:38-39 and Psalm 34 as much as the rest of the church seems to, greater variety would be less tedious for those communities that have regular daily services, or for individuals who use the texts in their private devotions.

We have also heard many comments from people who miss the practice introduced in *Holy Women, Holy Men* of offering four readings (Old Testament, New Testament, Gospel, and Psalm) for each commemoration, rather than only three. We have therefore provided four readings for each commemoration. (It remains, of course, appropriate to select either the Old Testament or the Epistle for the first lesson rather than using both.)

We offer our own best lectionary suggestions in a proposed resolution, mindful that bishops and deputies may certainly offer amendments if they find themselves bitterly disappointed at the selections for their favorite saint! We would, however, encourage anyone who is considering amendments to review how they might affect the entire lectionary. (Not everyone can have Micah 6:8!)

Proposed Transfers of Feasts

Some sections of the calendar have become particularly crowded, such as early February, while others have many more open days. However, many figures on the calendar have more than one date associated with their commemoration. We were able to identify eight individuals who could appropriately be moved to another date, which would reduce some of the congestion on the calendar.

In addition, we have heeded requests to offer a suggested fixed date for commemorating the first Book of Common Prayer, since it is very easy for “a weekday following Pentecost” to fall through the cracks.

We usually tried to choose newer commemorations as those that might be transferred, in the hopes that people have not yet had time to get attached to a particular date. However, under the rubrics for local commemorations it would still be permissible for individuals and communities to use the older date if they preferred.

Additions and Withdrawals

We are recommending a second reading for the withdrawal of William Porcher Dubose from the calendar, and second readings for adding Harriet Ross Tubman, Frederick Howden Jr., Simeon Bachos, and the Consecration of Barbara Clementine Harris to the calendar.

The trial use commemoration of Episcopal Deaconesses sparked much discussion. Although we are very keen to give greater recognition to the witness and ministry of Episcopal deaconesses, the calendar normally commemorates specific named individuals rather than particular vocations. We do not, for example, have feast days for nurses, bishops, theologians, or public servants, but rather of specific individuals in those vocations who serve as an icon of the whole. We are therefore proposing to withdraw the trial use commemoration of Episcopal Deaconesses, and to replace it with a proposed commemoration of Adeline Blanchard Tyler, the first Episcopal deaconess, and her companions. In addition, we would warmly welcome further suggestions of specific Episcopal deaconesses who might be candidates for inclusion on the calendar.

We are also proposing the commemoration of Queen Lili'uokalani of Hawai'i, which was referred to us by the 80th General Convention (2022-Do25). This commemoration was first referred to the SCLM in 2015 (2015-C002), but became lost in the transition from *Holy Women, Holy Men* to *A Great Cloud of Witnesses* to *Lesser Feasts and Fasts*. We are grateful for the persistence of those who have proposed it again. Although she is commemorated in Hawai'i on November 11, her death date, because this is both Veteran's Day and the feast of Martin of Tours, we fear that few communities outside of Hawai'i would ever be able to observe her. We are therefore proposing January 29, the date of her coronation as queen. Under the rubrics for local commemoration, however, it would still be possible for those who wished to observe the traditional date to do so.

We remind those considering proposing additional names for inclusion on the calendar that the normal path includes beginning with local commemoration at a diocesan level, and we encourage the

members of the church to continue developing local commemorations that may resonate particularly within their own context.

We hope that additions to the calendar might now begin to proceed at a slower pace, to give the church time to adjust to the large number of new figures that have been added within the last decade.

Future Work

We have identified the biographies in *Lesser Feasts and Fasts* as an area in need of further attention. In some cases, scholarship has changed significantly since biographies were first approved decades ago. In other cases, we have uncovered further information about an individual's involvement in indigenous boarding schools, segregation, the slave trade, or other concerns that need to be responsibly and sensitively addressed. Because the primary expertise of the SCLM is liturgical, we are suggesting the creation of a small working group of historians to review and, when necessary, re-write biographies over the next two triennia.

We would also like to revisit the question of adding additional optional fast days to the calendar, which General Convention had directed us to consider in 2018 (2018-A-67), but which was delayed by the pandemic. We had a robust conversation this biennium about possibilities, and hope that our successors will be able to take up that work.

Proposed Resolutions

A117 Withdraw Rev. William Porcher DuBose from the *Lesser Feasts and Fasts* Calendar -- Second Reading

Resolved, That the 81st General Convention authorize the deletion of William Porcher DuBose from the Calendar of the Church and liturgical propers from *Lesser Feasts and Fasts*.

A118 Authorize the Commemoration of Harriet Ross Tubman -- Second Reading

Resolved, That the 81st General Convention authorize the addition of Harriet Ross Tubman to the Calendar of the Church.

A119 Authorize the Commemoration of Frederick Howden, Jr. -- Second Reading

Resolved, That the 81st General Convention authorize the addition of Frederick Howden Jr. to the Calendar of the Church.

A120 Authorize the Commemoration of Simeon Bachos, the Ethiopian Eunuch -- Second Reading

Resolved, That the 81st General Convention authorize the addition of Simeon Bachos, the Ethiopian Eunuch, to the Calendar of the Church.

A121 Authorize the Commemoration of the Consecration of Barbara Clementine Harris -- Second Reading

Resolved, That the 81st General Convention authorize the addition of the Consecration of Barbara Clementine Harris to the Calendar of the Church.

A122 Withdraw the trial use commemoration of Episcopal Deaconesses

Resolved, That the 81st General Convention authorize the deletion of the trial use commemoration of Episcopal Deaconesses from the Calendar of the Church.

EXPLANATION

The Commission has heard feedback from the church that it would be better to honor specific, named, deaconesses rather than to honor the vocation generically, just as we honor specific nurses, bishops, teachers, or missionaries on the Calendar rather than honoring each vocation as a collective. For that reason, the Commission is separately proposing the commemoration of Adeline Blanchard Tyler and her companions. The Commission also warmly welcomes further proposals of specific Episcopal deaconesses for inclusion on the calendar.

A123 Authorize the trial use Commemoration of Adeline Blanchard Tyler and her Companions -- First Reading

Resolved, That the 81st General Convention authorize the trial use addition of Adeline Blanchard Tyler and her Companions to the Calendar of the Church on November 4th; and be it further

Resolved, That the 81st General Convention direct the Standing Commission on Liturgy and Music edit these propers for inclusion in Lesser Feasts and Fasts.

Support Document:

Adeline Blanchard Tyler and her Companions

Readings: Isaiah 58:1-12; Psalm 103:1-6; Romans 16:1-2, 25-27; Matthew 14:13-21

Preface of a Saint 1

Collect: Merciful God, who endowed Adeline and her companions with faith and courage, wisdom and humility, and called them to serve you as deaconesses, ministering to the sick, the oppressed, and the poor: By your grace, grant that we, following their example, may live to serve you as they did, revealing your steadfast love to the world, through our Lord Jesus Christ. Amen.

Adeline Blanchard Tyler (1805-1875) was the first Episcopal deaconess. Along with Caroline (Carrie) Elizabeth Guild (1827-1880), Eveline Black (1825-1875), and Catherine Minard (1837-1917), she was admitted to the office of deaconess on the 4th of November 1856. Accepting the threefold charge to be “servants of the Lord Jesus; servants to the sick and poor and needy, of every class, for Jesus’ sake; and servants to one another,” they provided nursing care, religious and practical education, material support, and advocacy at the newly established St. Andrew’s Infirmary in Baltimore. They cared for men, women, and children, Black and white, from near and far, and would become known as the United Deaconesses of Maryland.

Previously, Adeline had been a member of Boston’s Trinity Church, where she was among the founders of Trinity Hall, a Sunday School for poor children; the Episcopal City Mission; and St. Stephen’s Chapel. After joining the Church of the Advent in 1846 (where she would later sponsor Carrie Guild for baptism), Adeline continued in her works of Christian charity, becoming Matron of the Parish School, which the rector described as “a place of instruction for children of the Parish especially those who are poor and uncared for. We have about 50 children... 10 are the children of colored Parishioners.”

In 1856, the Rev. Horace Stringfellow, rector of St. Andrew’s Church in Baltimore, invited Adeline to head his new infirmary, the fulfillment of his vision to emulate the nursing Sisterhoods and Deaconess hospitals he had seen in England and France. Adeline and Carrie arrived in Baltimore from Boston that September. They joined Eveline Black and Catherine Minard, who had been working with Stringfellow since 1855 at St. Andrew’s Church, but did not become deaconesses until Bishop Whittingham formally assumed “Pastoral Supervision and Visitorial care of your Sisterhood and of the Infirmary and Schools” on November 4, 1856. Soon the four original Deaconesses were joined by two associates, identified as Miss Hickey and Miss Martin. The report of the Infirmary’s first year notes 53 patients admitted, 88 out-door patients, 756 visits made, 93 children in the Charity School, 500 garments and 85 pairs of shoes distributed, 5 patients baptized, 4 confirmed, 8 admitted to their “first reception of the Holy Communion.”

In April 1861, after the attack on Fort Sumter and President Lincoln's urgent call for troops to protect Washington, volunteers from the Massachusetts Sixth Regiment passing through Baltimore encountered a violent mob. That evening, upon learning that severely wounded soldiers had been taken to the Central Police Station, Adeline went there to request that they be released to her care — and was denied. After another unsuccessful attempt, she told the officer in charge, "I am myself a Massachusetts woman, seeking to do good to the citizens of my own state. If not allowed to do so I shall immediately send a telegram to Governor Andrew, informing him that my request has been denied." This convinced the officer to release the two most critically injured men to Adeline. She had them transported to the Deaconess House where they spent weeks recovering.

The need for experienced nurses and hospital superintendents during the Civil War led Adeline to the Camden Street Hospital in Baltimore, where she ministered to both Union and Confederate soldiers with an evenhandedness that sparked accusations by some of being "a Rebel sympathizer." Shortly thereafter, at the request of Dorothea Dix, she was placed in charge of the military hospital in Chester, Pennsylvania, where her colleagues included volunteer nurses from Maine and Massachusetts. They often had 1,000 men under their care. By early 1863 Adeline was in charge of the military hospital at the former Naval Academy in Annapolis, again with members of the nursing cohort who had served at Chester. She died on January 9, 1875.

A124 Authorize the trial use Commemoration of Lili'uokalani of Hawai'i -- First Reading

Resolved, That the 81st General Convention authorize the trial use addition of Lili'uokalani of Hawai'i to the Calendar of the Church on January 29; and it further

Resolved, That the 81st General Convention direct the Standing Commission on Liturgy and Music edit these propers for inclusion in Lesser Feasts and Fasts.

EXPLANATION

In the Diocese of Hawai'i, Lili'uokalani is usually commemorated on the anniversary of her death, November 11. Because this is the feast of Martin of Tours, a very popular saint to many Episcopalians, and also Veteran's Day/Remembrance Day, the Commission believes that more people would celebrate Lili'uokalani's feast if it were kept on a different date. We have suggested the date of her coronation as queen. However, under the rubrics permitting local commemorations, it would still be fully permissible for parishes and dioceses to use the traditional date of November 11.

Support Document:

Lili'uokalani of Hawai'i

Readings: Isaiah 26:1-8; Psalm 57:7-11; Colossians 3:12-15; Matthew 5:38-45

Preface of a Saint 1

Collect: Almighty God, who called your daughter Lili'uokalani to an earthly throne that she might advance your heavenly kingdom, and endowed her with gift of song and love for her people: Grant that we may imitate her perseverance in adversity, her commitment to peace, and her capacity for forgiveness. All this we ask in the name of your Son Jesus Christ, who lives, and reigns with you and the Holy Spirit, one God, for ever and ever. Amen.

Queen Lili'uokalani is an example of a strong indigenous woman who lived a life committed to justice, nonviolence, and reconciliation. Her words, actions, and legacy, bear witness to her deep faith in Christ Jesus, and her steadfastness in life as an example of a baptized and confirmed member of our Church and of the Cathedral of St. Andrew in Honolulu, Hawai'i.

A persistent advocate for justice and nonviolence, who recognized the “Beloved Community” in her own day, the Queen refused sanction the use of force or to encourage her people to respond violently when faced by heavily armed forces from the United States Navy acting in support of a band of insurrectionists (largely from the United States and Europe) as her government was illegally overthrown (January 17, 1893). In doing so, she prevented the undue bloodshed of her people against overwhelming force. She appealed to President Grover Cleveland by surrendering her throne to the American government and asked her subjects to respect her decision. She was forcefully removed from her throne and subsequently imprisoned for her witness in opposition to American imperialism. Her model of grace left a powerful symbol of God's love that continues to be at the center of the Native Hawaiian community and to the entire Church.

The Queen was also a respected musician and composer. One of her most well-known compositions is the Queen's Prayer or Ke Aloha o Ka Haku sung most Sundays at parishes in Hawai'i. It is based upon the readings of the only two books allowed to her during her imprisonment, the Holy Bible and the Book of Common Prayer. As a neighbor to St. Andrew's Cathedral, she received refuge during the counterrevolution with the Anglican Sisters at St. Andrew's Priory School for Girls. They and the Bishop, the Right Reverend Alfred Willis, would minister and visit her during her imprisonment and these deeds of charity would influence Her Majesty to become a member of our Church. The lyrics reflect her faith in the face of adversity:

A 'o kou 'o ia i'ō, he hemolelo ho'I Your truth, so perfect.

Ko'u noho mihi ana, a pa'ahao ia I live in sorrow, imprisoned.

O 'oe ku'u lama, kou nani, ko'u ko'o You are my light, your glory my support
Mai nana 'ino'ino, na hewa o kanaka Behold not with malevolence, the sins of man,
Aka e huikala, a ma'ema'e no But forgive, and forgive.
No laila e ka Haku, ma lalao kou 'eheu And so, O Lord, beneath your wings,
Ko makou maluhia, a mau loa aku no Be our peace, forever more.

A125 Add Optional Fast Days to Lesser Feasts and Fasts

Resolved, That the 81st General Convention direct the Standing Commission on Liturgy and Music to research possible optional fasts days for inclusion in Lesser Feasts and Fasts, and to bring draft propers to the 82nd General Convention.

A126 Transfer dates of commemorations in Lesser Feasts and Fasts

Resolved, That the 81st General Convention authorize the following transfers of dates in Lesser Feasts and Fasts.

Cornelius the Centurion: Transfer from February 4 to October 20.

Martyrs of Japan: Transfer from February 5 to February 6

Theodora: Transfer from February 11 to February 12

Mary of Egypt: Transfer from April 3 to March 30

Simeon Bachos: Transfer from August 27 to August 26

Remigius of Rheims: Transfer from October 1 to October 2

Nicholas Ferrar: Transfer from December 1 to December 8

First Book of Common Prayer: Fix date on June 13

EXPLANATION

Many individuals on the Calendar are commemorated on more than one date by different provinces of the Anglican Communion and by other churches. These figures are currently commemorated on a date that is shared with another feast. By transferring them to another date associated with them, it prevents congestion in some months, and allows for most feasts to be observed. Under the rubrics for local commemoration, any community that preferred to use the traditional date could still keep the feast then. In addition, some have suggested that having a fixed date on which to commemorate

the First Book of Common Prayer would be more helpful than a moveable feast in the first week after Pentecost.

A127 Establish a Working Group to Update Biographies in Lesser Feasts and Fasts

Resolved, That the 81st General Convention authorize the creation of a small working group of church historians to review the biographies in Lesser Feasts and Fasts, taking note of changes in scholarship that have occurred since many of the biographies were first approved, and make any appropriate revisions; and be it further

Resolved, That the working group also examine any role that figures commemorated on the calendar might have had in issues including (but not limited to) the slave trade, indigenous boarding schools, and segregation, and recommend ways to appropriately address any concerns that are identified; and be it further

Resolved, That the working group report through the Standing Commission on Liturgy and Music, and be given two triennia to fully complete its work.

A128 Concerning minor edits to Lesser Feasts and Fasts

Resolved, That the 81st General Convention authorizes the Standing Commission on Liturgy and Music to make minor corrections to grammar, typos, and errors of fact in each edition of Lesser Feasts and Fasts, following Canon I.1.2.n.2.ix. Such minor corrections need not take the form of a General Convention resolution, but should be noted in the next edition of the Blue Book Report. Major revisions to bios, collects, or readings would continue to come before General Convention.

EXPLANATION

Each year there are numerous small errors found within the entries in Lesser Feasts and Fasts, as well as suggestions for small tweaks to punctuation and grammar that would make the collects easier to read aloud. This resolution clarifies that minor changes of this nature could be made by the SCLM as part of the process of preparing each edition for publication, as long as they are reported back to the Church. Any substantive changes to the propers or bios would continue to come to General Convention in the form of resolutions.

A129 Lectionary for Lesser Feasts and Fasts

Resolved, That the 81st General Convention authorize the following lectionary for Lesser Feasts and Fasts.

EXPLANATION

This revised lectionary restores the practice introduced in Holy Women, Holy Men of offering both an Old Testament and an Epistle reading for each commemoration. It also removes repetitious passages and thus allows for a greater exposure to scripture throughout the course of the year. The proposed lectionary includes the calendar additions, deletions, and date transfers proposed in separate resolutions, and should be amended accordingly if General Convention does not approve those changes.

Support Document:

Lectionary for Lesser Feasts and Fasts

January 1 **The Holy Name of Our Lord Jesus Christ**

Numbers 6:22-27; Psalm 8; Galatians 4:4-7 or Philippians 2:5-11; Luke 2:15-21

January 4 Elizabeth Ann Seton

2 Esdras 2:15-24; Psalm 119:105-112; Romans 16:17-20; Luke 14:15-23

January 5 Sarah, Theodora, and Syncletica of Egypt

Proverbs 9:1-6; Psalm 119:65-72; James 4:1-10; Mark 12:18-27

January 6 **The Epiphany of Our Lord Jesus Christ**

Isaiah 60:1-6; Psalm 72:1-7, 10-14; Ephesians 3:1-12; Matthew 2:1-12

January 8 Harriet Bedell

Exodus 2:1-10; Psalm 93; 1 Corinthians 1:4-9; Matthew 5:43-48

January 9 Julia Chester Emery

Ecclesiasticus 3:30-4:6; Psalm 123; Romans 12:6-13; Mark 10:42-45

January 10 William Laud

Wisdom 1:6-15; Psalm 73:24-29; Hebrews 12:5-14; Matthew 10:32-29

January 12 Aelred of Rievaulx

Ecclesiasticus 6:5-17; Psalm 36:5-10; Philippians 2:1-4; John 15:9-17

January 13 Hilary of Poitiers

Zechariah 6:9-15; Psalm 9:7-10; 1 John 2:18-25; Luke 15:1-7

January 14 Richard Meux Benson and Charles Gore

1 Kings 19:9-18; Psalm 27:7-11; 1 John 4:7-12; John 17:6-11

January 17 Antony of Egypt

Ecclesiastes 6:1-12; Psalm 90:1-12; James 1:9-11; Mark 10:17-22

January 18 **The Confession of Saint Peter the Apostle**

Acts 4:9-13; Psalm 23; 1 Peter 5:1-4; Matthew 16:13-20

January 19 Wulfstan of Worcester

Genesis 12:1-9; Psalm 84:7-12; 1 Corinthians 4:1-5; John 15:5-8

January 20 Fabian

2 Esdras 2:42-48; Psalm 6; 1 Corinthians 15:35-44; Matthew 10:24-31

January 21 Agnes and Cecilia of Rome

Song of Songs 2:10-13; Psalm 45:10-16; 2 Corinthians 6:16-18; Matthew 18:1-6

January 22 Vincent of Saragossa

Jeremiah 26:12-15; Psalm 31:1-5; Revelation 7:13-17; Luke 12:4-12

January 23 Phillips Brooks

Jonah 3:1-10; Psalm 49:1-10; Ephesians 3:14-21; Matthew 20:1-16

January 24 Florence Li Tim-Oi

Joel 2:28-32; Psalm 116:1-12; Galatians 3:23-29; Luke 5:1-11

January 25 **The Conversion of Saint Paul the Apostle**

Acts 26:9-21; Psalm 67; Galatians 1:11-24; Matthew 10:16-22

January 26 Timothy and Titus

Isaiah 42:1-7; Psalm 30:1-5; 2 Timothy 1:1-8 or Titus 1:1-5; John 10:1-10

January 27 John Chrysostom

Jeremiah 1:4-10; Psalm 49:1-8; 1 Corinthians 12:31-13:7; Luke 21:12-15

January 28 Thomas Aquinas

Wisdom 7:7-14; Psalm 119:97-104; 1 Corinthians 11:23-26; Matthew 13:24-30

January 29 [Lili'uokalani of Hawai'i]

Isaiah 26:1-8; Psalm 57:7-11; Colossians 3:12-15; Matthew 5:38-45

January 31 Marcella of Rome

1 Kings 17:8-16; Psalm 12; Colossians 3:1-4; Luke 6:17-26

February 1 Brigid of Kildare

Tobit 2:9-14; Psalm 138; 1 Corinthians 1:26-31; Matthew 6:19-24

February 2 **Presentation of Our Lord Jesus Christ in the Temple**

Malachi 3:1-4; Psalm 84 or Psalm 24:7-10; Hebrews 2:14-18; Luke 2:22-40

February 3 Anskar

Genesis 11:1-9; Psalm 13; Acts 1:1-9; Mark 6:7-13

February 4 Manche Masemola

Ruth 1:8-18; Psalm 118:8-14; James 5:7-11; Matthew 19:13-15

February 5 Agatha of Sicily

Judith 9: 1-4 (5-9) 10-14; Psalm 125; Romans 8:31-39; Mark 9:42-50

February 6 Martyrs of Japan

Lamentations 3:52-60; Psalm 39:5-8; Galatians 2:19-3:6; Mark 8:34-38

February 8 Josephine Margaret Bakhita

Amos 8:4-12; Psalm 3; James 2:1-7; Luke 3:1-9

February 10 Scholastica

Ecclesiastes 12:1-18; Psalm 4:1-5; Acts 4:32-35; Matthew 6:5-8

February 11 Consecration of Barbara Clementine Harris

Isaiah 58:6-12; Psalm 33:18-22; Philippians 4:1-9; Luke 18:1-8

February 12 Theodora

1 Samuel 25:2-3, 23-31; Psalm 100; Colossians 1:15-20; Luke 17:1-10

February 13 Absalom Jones

Isaiah 42:5-9; Psalm 126; Galatians 5:1-5; John 15:12-15

February 14 Cyril and Methodius

Ecclesiastes 4:7-12; Psalm 29; Philippians 1:15-26; Mark 16:15-20

February 15 Thomas Bray

Jonah 4:1-11; Psalm 85:7-13; Philippians 2:5-11; Luke 5:27-32

February 17 Janani Luwum

Ecclesiasticus 4:20-28; Psalm 119:129-136; 2 Corinthians 6:1-10; John 12:24-32

February 18 Martin Luther

Isaiah 55:6-11; Psalm 46; Romans 3:21-28; John 15:1-11

February 19 Agnes Tsao Kou Ying, Agatha Lin Zhao, and Lucy Yi Zhenmei

Exodus 23:1-9; Psalm 25; 2 Corinthians 6:16-18; Matthew 25:1-13

February 20 Frederick Douglass

Isaiah 32:11-18; Psalm 35:23-28; Hebrews 2:10-13; Luke 4:14-21

February 22 Margaret of Cortona

Zephaniah 3:7-13; Psalm 30:6-13; James 5:1-6; Luke 7:36-50

February 23 Polycarp of Smyrna

Numbers 23:5-12; Psalm 119:9-16; Revelation 2:8-11; Matthew 20:20-28

February 24 **Saint Matthias**

Acts 1:15-26; Psalm 15; Philippians 3:13b-21; John 15:1, 6-16

February 25 Emily Malbone Morgan

2 Samuel 14:12-17; Psalm 119:137-144; Romans 16:1-6; Luke 10:38-42

February 26 Photini

Genesis 24:12-20; Psalm 119:73-80; Colossians 2:16-23; John 4:4-26

February 27 George Herbert

Ecclesiastes 4:13-5:7; Psalm 23; 2 Corinthians 4:16-18; Mark 9:2-8

February 28 Anna Julia Haywood Cooper

Proverbs 9:7-12; Psalm 10:15-19; 1 Timothy 4:6-16; Luke 4:38-42

March 1 David of Wales

Proverbs 15:14-21; Psalm 135:13-21; 1 Thessalonians 2:7b-12; Mark 4:26-29

March 2 Chad of Lichfield

Leviticus 10:1-3; Psalm 103:13-18; Philippians 4:10-13; Luke 14:1-14

March 3 John and Charles Wesley

Isaiah 6:1-8; Psalm 129; Romans 12:11-17; Luke 9:1-6

March 7 Perpetua and Felicity

Daniel 6:10-16; Psalm 124; Hebrews 10:32-29; Matthew 24:9-14

March 9 Gregory of Nyssa

Wisdom 7:21-8:1; Psalm 8; Ephesians 2:17-22; John 14:23-26

March 10 Harriet Ross Tubman

Judges 9:50-55; Psalm 102:18-28; James 2:14-17; Luke 11:5-10

March 12 Gregory the Great

Genesis 18:1-15; Psalm 66:1-8; Colossians 1:28-2:3; Mark 10:42-45

March 13 James Theodore Holly

Deuteronomy 6:20-25; Psalm 86:11-17; Acts 8:26-39; John 4:31-38

March 15 Vincent de Paul and Louise de Marillac

Micah 3:1-12; Psalm 37:1-17; Philippians 2:12-15; Matthew 18:18-20

March 17 Patrick of Ireland

Ezekiel 36:33-38; Psalm 97; 1 Thessalonians 2:1-8; Matthew 28:16-20

March 18 Cyril of Jerusalem

Ecclesiasticus 47:2-10; Psalm 29; Hebrews 13:14-21; Mark 9:38-41

March 19 **Saint Joseph**

2 Samuel 7:4, 8-16; Psalm 89:1-29 or 89:1-4, 26-29; Romans 4:13-18; Luke 2:41-52

March 20 Cuthbert

Job 38:1, 12-21; Psalm 23; 2 Corinthians 6:1-10; Luke 5:12-16

March 21 Thomas Ken

Deuteronomy 26:16-19; Psalm 22:27-31; Philippians 4:4-9; Luke 19:1-9

March 22 James DeKoven

Exodus 24:1-8; Psalm 84:7-12; 2 Timothy 2:10-15; Luke 16:1-15

March 23 Gregory the Illuminator

Ecclesiastes 2:1-11; Psalm 33:6-11; Acts 17:22-31; Mark 2:18-22

March 24 Oscar Romero

1 Kings 21:1-19; Psalm 31:15-24; Revelation 7:13-17; John 12:20-26

March 25 **The Annunciation of Our Lord Jesus Christ to the Blessed Virgin Mary**

Isaiah 7:10-14; Psalm 45 or 40:5-10 or Canticle 3 or 15; Hebrews 10:4-10; Luke 1:26-38

March 26 Harriet Monsell

Isaiah 66:1-4; Psalm 133; 1 Timothy 6:6-10; John 3:25-30

March 27 Charles Henry Brent

Isaiah 56:6-8; Psalm 122; Ephesians 4:1-6; Matthew 9:35-38

March 28 James Solomon Russell

1 Kings 5:1-12; Psalm 127; 1 Timothy 6:11-16; Matthew 18:12-24

March 29 John Keble

Jeremiah 18:1-11; Psalm 150; Romans 12:9-21; Mark 1:9-13

March 30 Mary of Egypt

Hosea 11:1-4, 8-9; Psalm 48:8-14; Hebrews 11:32-40; John 8:1-11

March 31 John Donne

Ecclesiastes 9:1-12; Psalm 16; 1 Corinthians 15:20-28; John 5:19-24

April 1 Frederick Denison Maurice

Numbers 21:4-9; Psalm 145; Acts 2:42-47; John 18:33-37

April 2 James Lloyd Breck

Joshua 24:14-18; Psalm 119:145-152; 1 Corinthians 3:1-7; Luke 7:1-10

April 3 Richard of Chichester

Proverbs 16:16-20; Psalm 101:104; Jude 1:17-25; Luke 3:7-14

April 4 Martin Luther King, Jr.

Exodus 3:7-12; Psalm 77:11-20; Ephesians 6:10-20; Luke 6:27-36

April 5 Harriet Starr Cannon

Wisdom 16:20-26; Psalm 131; Hebrews 13:7-16; Mark 9:33-37

April 7 Tikhon

Jeremiah 31:10-14; Psalm 72; 2 Peter 1:3-11; Matthew 21:28-32

April 8 William Augustus Muhlenberg

Isaiah 63:7-9; Psalm 100; James 1:12-18; Matthew 21:12-16

April 9 Dietrich Bonhoeffer

Judges 7:1-8a; Psalm 119:81-88; Romans 6:3-11; Matthew 13:47-52

April 10 William Law

Ecclesiasticus 1:11-20; Psalm 128; 2 Peter 1:3-11; Matthew 6:1-8

April 11 George Augustus Selwyn

Ecclesiasticus 1:1-10; Psalm 21:1-4; Ephesians 2:8-10; Matthew 10:7-16

April 14 Zenaida, Philonella, and Hermione

Ecclesiasticus 38:1-15; Psalm 147; Acts 2:47-47; Mark 1:29-34

April 15 Damien of Molokai and Marianne Cope

Isaiah 57:14-19; Psalm 32:7-12; 1 Corinthians 4:9-13; Matthew 11:1-6

April 16 Peter Williams Cassey and Anna Besant Cassey

Proverbs 22:1-9; Psalm 13; Romans 8:31-39; Matthew 5:13-16

April 17 Kateri Tekakwitha

1 Kings 19:19-21; Psalm 6; 1 Thessalonians 5:16-24; Matthew 8:18-22

April 18 Juana Inés de la Cruz

Judith 16:1-10; Psalm 56:8-12; Ephesians 4:20-27; Matthew 5:17-20

April 19 Alphege

Micah 2:1-11; Psalm 30:1-5; Colossians 1:24-29; Luke 12:35-40

April 21 Anselm

Wisdom 6:12-16; Psalm 108:1-6; Romans 5:1-11; Matthew 11:25-30

April 22 Hadewijch of Brabant

Isaiah 52:13-53:12; Psalm 57:6-11; Galatians 5:22-26; John 19:31-37

April 23 Toyohiko Kagaw

Job 13:13-22; Psalm 140; Philippians 1:10-20; Luke 22:47-53

April 25 **Saint Mark the Evangelist**

Isaiah 52:7-10; Psalm 2 or 2:7-10; Ephesians 4:7-8, 11-16; Mark 1:1-15 or 16:15-20

April 27 Zita of Tuscany

Exodus 1:15-21; Psalm 16; James 2:1-7; Mark 12:41-44

April 29 Catherine of Siena

Lamentations 3:31-36; Psalm 36; 1 John 1:5-2:2; Luke 12:22-31

May 1 **Saint Philip and Saint James**

Isaiah 30:18-21; Psalm 119:33-40; 2 Corinthians 4:1-6; John 14:6-14

May 2 Athanasius of Alexandria

Ezekiel 3:1-14; Psalm 71:1-8; 1 John 5:1-5; Matthew 10:24-33

May 3 Elisabeth Cruciger

Joel 2:23-29; Psalm 26; Colossians 3:11-17; Mark 4:26-29

May 4 Monica

1 Samuel 1:10-20; Psalm 115:12-18; Galatians 4:1-12a; Luke 7:11-17

May 5 Martyrs of the Reformation Era

Ezekiel 34:1-10; Psalm 51:10-17; 2 Corinthians 4:7-12; Matthew 7:1-6

May 8 Julian of Norwich

Isaiah 49:13-18; Psalm 27:7-11; Hebrews 10:19-24; Matthew 23:37-39

May 9 Gregory of Nazianzus

Jonah 1:1-16; Psalm 19:7-14; Ephesians 3:14-21; John 8:25-32

May 11 Johann Arndt and Jacob Boehme

Exodus 17:1-7; Psalm 119:25-32; Romans 7:21-25; Mark 6:45-52

May 13 Frances Perkins

Deuteronomy 15:7-11; Psalm 37:27-31; Ephesians 4:25-5:2; Luke 9:10-17

May 15 Pachomius of Tabenissi

1 Samuel 10:20-27; Psalm 16; 2 Timothy 2:1-6; Mark 10:23-31

May 17 Thurgood Marshall

Amos 5:10-15; Psalm 34:15-22; 1 Corinthians 13:1-13; Matthew 23:1-12

May 19 Dunstan

Exodus 25:31-40; Psalm 67:6-11; Ephesians 5:15-20; Matthew 24:42-47

May 20 Alcuin of York

Ecclesiastes 3:1-8; Psalm 107:1-8; Titus 2:1-3; Matthew 13:24-30

May 21 Lydia of Thyatira

Malachi 3:16-18; Psalm 100; Acts 16:11-15; Luke 15:8-10

May 22 Helena of Constantinople

Micah 4:1-4; Psalm 2; 2 Corinthians 8:7-15; Luke 23:26-32

May 24 Jackson Kemper

Exodus 15:22-25; Psalm 67; 1 Corinthians 3:8-15; Luke 13:1-9

May 25 Bede

Ecclesiastes 12:9-14; Psalm 139:10-17; 1 Corinthians 15:1-8; Matthew 13:31-33

May 26 Augustine of Canterbury

Tobit 13:1, 10-11; Psalm 66:1-8; 2 Corinthians 5:17-21; Luke 5:1-11

May 28 Mechthild of Magdeburg

Song of Songs 3:1-5; Psalm 71:17-23; 2 Thessalonians 3:6-13; Mark 8:22-26

May 31 **The Visitation of the Blessed Virgin Mary**

1 Samuel 2:1-10; Psalm 113; Romans 12:9-16b; Luke 1:39-57

June 1 Justin

Deuteronomy 7:7-9; Psalm 116:1-9; 1 Corinthians 1:18-25; John 12:44-50

June 2 Blandina and Her Companions, the Martyrs of Lyons

Jeremiah 12:1-4; Psalm 3; 1 Peter 1:3-9; Mark 14:32-42

June 3 The Martyrs of Uganda, 1886

Habakkuk 2:9-14; Psalm 138; Hebrews 10:32-39; Matthew 24:9-14

June 4 John XXIII (Angelo Giuseppe Roncalli)

Numbers 11:10-17; Psalm 50:1-6; 1 Peter 5:1-4; Luke 5:36-39

June 5 Boniface

Ecclesiastes 3:16-22; Psalm 115:1-8; Acts 20:17-28; Mark 8:27-30

June 8 Melania the Elder

Exodus 4:24-26; Psalm 119:113-120; Romans 8:18-25; Mark 8:14-21

June 9 Columba of Iona

Wisdom 19:18-22; Psalm 111; 1 Corinthians 3:16-23; Luke 10:17-20

June 10 Ephrem of Nisibis

Job 38:1-11; Psalm 68:11-18; Ephesians 3:8-12; Mark 9:38-41

June 11 **Saint Barnabas**

Isaiah 42:5-12; Psalm 112; Acts 11:19-30, 13:1-3; Matthew 10:7-16

June 12 Enmegahbowh

Isaiah 52:1-6; Psalm 129; 1 Peter 5:1-4; Luke 6:17-26

June 13 First Book of Common Prayer

1 Kings 8:54-61; Psalm 103:8-12; Acts 2:38-42; Luke 8:16-18

June 14 Basil of Caesarea

Ezekiel 22:23-30; Psalm 139:1-9; 1 Corinthians 2:6-13; Luke 10:21-24

June 15 Evelyn Underhill

2 Kings 22:14-20; Psalm 96:7-13; 1 Corinthians 4:1-5; John 4:19-24

June 16 Joseph Butler

Ecclesiastes 1:12-18; Psalm 134; Acts 13:38-44; Luke 10:25-28

June 17 Marina the Monk

Susanna 34-46; Psalm 148; James 1:19-27; Luke 18:18-30

June 18 Bernard Mizeki

Nehemiah 6:6-11; Psalm 70; Revelation 7:13-17; Luke 12:1-12

June 19 Adelaide Teague Case

Proverbs 4:1-9; Psalm 134; Hebrews 5:11-6:1; Mark 4:21-25

June 22 Alban

Wisdom 3:1-9; Psalm 125; 1 John 3:13-16; Matthew 10:34-42

June 24 **The Nativity of Saint John the Baptist**

Isaiah 40:1-11; Psalm 85 or 85:7-13; Acts 13:14b-26; Luke 1:57-80

June 26 Isabel Florence Hapgood

Numbers 27:1-11; Psalm 24; Revelation 5:8-14; John 15:5-8

June 28 Irenaeus of Lyons

Proverbs 8:6-11; Psalm 8; 2 Timothy 2:22-26; Luke 11:33-36

June 29 **Saint Peter and Saint Paul**

Ezekiel 34:11-16; Psalm 87; 2 Timothy 4:1-8; John 21:15-19

July 1 Pauli Murray

Isaiah 55:10-13; Psalm 119:17-24; Galatians 3:23-29; Mark 12:1-12

July 2 Moses the Black

2 Chronicles 28:8-15; Psalm 62; Acts 22:6-21; Luke 23:39-43

July 4 **Independence Day** (United States)

Deuteronomy 10:17-21; Psalm 149 or 149:1-9; Hebrews 11:8-16; Matthew 5:43-48

July 6 Eva Lee Matthews

Micah 6:6-8; Psalm 90:1-12; Acts 4:32-35; Matthew 26:6-13

July 8 Priscilla and Aquila

Jeremiah 23:23-32; Psalm 18:30-36; Acts 18:1-4, 18-21, 24-28; Luke 24:28-35

July 11 Benedict of Nursia

1 Kings 17:2-6; Psalm 4:1-5; Philippians 2:12-18; Luke 14:26-33

July 14 Argula von Grumbach

Judges 4:4-9; Psalm 118:19-29; James 2:8-13; Matthew 7:24-29

July 17 William White

Jeremiah 1:4-10; Psalm 40:4-10; 1 Timothy 3:1-10; Mark 4:30-34

July 19 Macrina of Caesarea

Ecclesiasticus 51:13-22; Psalm 119:121-128; Philippians 3:7-11; Mark 3:20-34

July 20 Elizabeth Cady Stanton, Amelia Bloomer, and Sojourner Truth

Esther 1:1-21; Psalm 146; 1 Peter 4:10-11; Luke 11:5-10

July 21 Maria Skobtsova

Judges 5:1-9; Psalm 9:7-10; Romans 8:28-30; John 2:1-10

July 22 **Saint Mary Magdalene**

Judith 9:1, 11-14; Psalm 42:1-7; 2 Corinthians 5:14-18; John 20:11-18

July 23 John Cassian

2 Kings 2:9-15; Psalm 145:1-7; 1 John 3:1-3; John 1:1-14

July 24 Thomas à Kempis

Ecclesiastes 1:1-11; Psalm 113; Ephesians 4:32-5:2; Matthew 18:18-20

July 25 **Saint James the Apostle**

Jeremiah 45:1-5; Psalm 7:1-10; Acts 11:27-12:3; Matthew 20:20-28

July 26 The Parents of the Blessed Virgin Mary

Genesis 17:1-8; Psalm 132:11-19; 1 Thessalonians 1:1-5; Luke 1:26-33

July 27 William Reed Huntington

Joel 2:12-17; Psalm 133; Galatians 6:14-18; John 17:20-26

July 28 Johann Sebastian Bach

2 Chronicles 5:11-14; Psalm 150; Colossians 2:2-6; Luke 2:8-14

July 29 Mary and Martha of Bethany

1 Samuel 25:18-38; Psalm 36:1-5; Romans 12:9-13; Luke 10:38-42

July 30 William Wilberforce

2 Samuel 12:1-10; Psalm 35:23-28; James 5:1-6; Matthew 20:1-16

July 31 Ignatius of Loyola

Genesis 32:22-31; Psalm 22:27-31; 1 Corinthians 10:31-11:1; Luke 9:57-62

August 1 Joseph of Arimathea

Proverbs 4:10-18; Psalm 128; James 1:17-18; Luke 23:50-56

August 3 Joanna, Mary, and Salome

Job 2:11-13; Psalm 50; Acts 2:29-36; Mark 16:1-8

August 6 **The Transfiguration of Our Lord Jesus Christ**

Exodus 34:29-35; Psalm 99 or 99:5-9; 2 Peter 1:13-21; Luke 9: 28-36

August 7 John Mason Neale

2 Chronicles 20:20-21; Psalm 102:18-28; 1 Corinthians 1:1-9; Matthew 13:44-46

August 8 Dominic

Ecclesiastes 12:1-8; Psalm 103:1-7; Romans 10:13-17; John 7:16-18

August 9 Edith Stein (Teresa Benedicta of the Cross)

Jeremiah 31:31-34; Psalm 119:49-56; 2 Corinthians 12:1-10; John 3:1-15

August 10 Laurence of Rome

Daniel 3:19-27; Psalm 126; 2 Corinthians 9:6-10; Luke 14:12-14

August 11 Clare of Assisi

Ecclesiastes 5:8-15; Psalm 49:16-20; 1 Peter 4:1-2; Luke 12:32-34

August 12 Florence Nightingale

Jeremiah 30:12-17; Psalm 41; 1 Corinthians 12:4-11; Luke 10:29-37

August 13 Jeremy Taylor

Ecclesiastes 3:1-15; Psalm 114; Romans 14:7-12; Mark 13:32-37

August 14 Jonathan Myrick Daniels

Amos 5:18-24; Psalm 89:7-13; Galatians 3:22-28; Luke 1:46-55

August 15 **Saint Mary the Virgin, Mother of our Lord Jesus Christ**

Isaiah 61:10-11; Psalm 34 or 34:1-9; Galatians 4:4-7; Luke 1:46-55

August 20 Bernard of Clairvaux

Song of Songs 1:1-8; Psalm 139:1-9; Jude 1-3; Mark 10:23-31

August 24 **Saint Bartholomew**

Deuteronomy 18:15-18; Psalm 91 or 91:1-4; 1 Corinthians 4:9-15; Luke 22:24-30

August 25 Louis

Wisdom 7:1-6; Psalm 21:1-7; Colossians 2:6-10; Mark 2:13-17

August 26 Simeon Bachos the Ethiopian Eunuch

Isaiah 53:1-9; Psalm 68:28-35; Acts 8:26-40; Matthew 19:3-12

August 27 Thomas Gallaudet and Henry Winter Syle

Isaiah 35:1-7; Psalm 119:1-8; 2 Thessalonians 1:3-4; Mark 7:31-37

August 28 Augustine of Hippo

Wisdom 16:20-26; Psalm 87; Hebrews 12:22-29; John 14:5-15

August 29 The Beheading of Saint John the Baptist

Wisdom 2:23-3:9; Psalm 5:1-5; 2 Corinthians 4:5-11; Matthew 14:1-12

August 30 Margaret Ward, Margaret Clitherow, and Anne Line
Ezekiel 37:1-14; Psalm 43; Romans 1:16-17; Mark 13:3-13

August 31 Aidan of Lindisfarne
Proverbs 3:21-32; Psalm 103:13-18; 1 Corinthians 9:16-23; Matthew 19:27-30

September 1 David Pendleton Oakerhater
Daniel 1:1-17; Psalm 11; Romans 8:1-6; Luke 10:1-9

September 2 The Martyrs of New Guinea
1 Chronicles 22:11-13; Psalm 130; Revelation 7:9-12; Luke 12:4-12

September 3 Phoebe
Ezekiel 2:1-7; Psalm 40:4-10; Romans 16:1-7; Luke 11:42-54

September 4 Paul Jones
Malachi 2:17-3:5; Psalm 120; 1 Peter 3:8-17; John 8:31-36

September 5 Katharina Zell
Genesis 38:6-26; Psalm 71:17-23; Galatians 5:13-18; Luke 4:23-30

September 6 Hannah More
Genesis 21:14-21; Psalm 146:4-9; Romans 13:8-10; John 9:1-12

September 7 Kassiani
1 Samuel 2:1-10; Psalm 57:6-11; 1 Corinthians 7:29-35; Mark 4:30-34

September 8 The Nativity of the Blessed Virgin Mary
1 Samuel 1:10-20; Psalm 27:1-5; Ephesians 1:3-14; Luke 1:26-38

September 9 Constance, Thecla, Ruth, Frances, Charles Parsons, and Louis Schuyler
Jeremiah 18:1-11; Psalm 17:6-10; 2 Corinthians 1:3-5; John 12:24-28

September 10 Alexander Crummell
Ecclesiasticus 39:6-11; Psalm 19:7-11; James 1:2-5; Mark 4:21-25

September 12 John Henry Hobart
Job 38:1, 22-30; Psalm 92:1-7; Titus 1:7-9; Mark 8:1-13

September 13 Cyprian of Carthage

Jeremiah 14:13-18; Psalm 116:10-17; James 4:11-17; John 10:11-16

September 14 **Holy Cross Day**

Isaiah 45:21-25; Psalm 98 or 98:1-4; Philippians 2:5-7 or Galatians 6:14-18; John 12:13-36a

September 15 Catherine of Genoa

Zephaniah 1:7-18; Psalm 86:3-12; James 5:1-6; Mark 9:43-50

September 16 Ninian

Numbers 22:21-33; Psalm 97; Acts 10:21-35; Matthew 28:16-20

September 17 Hildegard of Bingen

Ecclesiasticus 43:1-12; Psalm 8; Colossians 3:14-17; John 3:16-21

September 18 Edward Bouverie Pusey

Ezekiel 36:24-28; Psalm 106:1-5; 1 Peter 2:19-23; Matthew 18:12-14

September 19 Theodore of Tarsus

Malachi 2:5-7; Psalm 34:9-14; James 2:14-26; Matthew 24:42-47

September 20 John Coleridge Patteson

1 Chronicles 21:1-13; Psalm 9:11-20; 1 Peter 4:12-19; Mark 8:34-38

September 21 **Saint Matthew**

Proverbs 3:1-6; Psalm 119:33-40; 2 Timothy 3:14-17; Matthew 9:9-13

September 22 Philander Chase

Isaiah 44:1-8; Psalm 117; Acts 18:7-11; Luke 9:1-6

September 23 Thecla of Iconium

Judges 4:16-24; Psalm 123; 2 Timothy 3:10-12; Luke 24:1-11

September 24 Anna Ellison Butler Alexander

Deuteronomy 6:4-9; Psalm 78:1-7; 2 Timothy 3:14-4:5; Matthew 11:25-30

September 25 Sergius of Radonezh

Ecclesiasticus 29:1-9; Psalm 39:4-8; 1 John 2:15-17; Mark 2:23-28

September 26 Lancelot Andrewes

Isaiah 11:1-9; Psalm 63:1-7; 1 Timothy 2:1-7; Luke 11:1-4

September 27 Euphrosyne/Smaragdus of Alexandria

Judges 11:32-40; Psalm 19; 1 Corinthians 13:8-13; Luke 14:26-33

September 28 Paula and Eustochium of Rome

Judith 8:9-17; Psalm 111; James 4:1-10; Luke 8:1-3

September 29 **Saint Michael and All Angels**

Genesis 28:10-17; Psalm 103 or 103:19-22; Revelation 12:7-12; John 1:47-51

September 30 Jerome

Numbers 9:15-23; Psalm 19:7-14; Colossians 3:5-11; Luke 24:44-48

October 1 Thérèse of Lisieux

Judith 8:1-8; Psalm 119:57-64; Colossians 3:1-4; Luke 21:1-4

October 2 Remigius of Rheims

Jeremiah 10:1-11; Psalm 135:13-21; 1 John 4:1-6; John 14:1-7

October 3 John Raleigh Mott

Isaiah 60:1-5; Psalm 133; 1 John 2:12-14; Luke 7:11-17

October 4 Francis of Assisi

Job 39:1-18; Psalm 121; Acts 4:32-35, 5:1-11; Luke 12:13-21

October 6 William Tyndale

Proverbs 8:10-17; Psalm 15; James 1:19-27; John 12:44-50

October 7 Birgitta of Sweden

1 Samuel 28:3-19; Psalm 12; 1 Corinthians 14:6-12; Matthew 11:2-15

October 9 Robert Grosseteste

Ezekiel 1:1-14; Psalm 90:13-17; Titus 2:11-15; Luke 16:10-15

October 10 Vida Dutton Scudder

Job 38:1. 34-41; Psalm 25:1-14; Romans 12:1-2, 14-21; John 6:37-51

October 11 Philip

Leviticus 19:9-16; Psalm 67; Acts 8:26-40; Luke 24:13-27

October 12 Edith Cavell

Joshua 2:1-21; Psalm 46; Romans 2:1-4; Matthew 18:21-35

October 14 Samuel Isaac Joseph Schereschewsky

Isaiah 12:1-6; Psalm 90:1-12; 2 Corinthians 4:11-18; Luke 15:1-7

October 15 Teresa of Avila

1 Samuel 3:1-18; Psalm 42:1-7; Romans 8:22-27; Mark 1:35-39

October 16 Hugh Latimer and Nicholas Ridley and Thomas Cranmer

Zephaniah 3:1-5; Psalm 142; 1 Corinthians 3:9-14; John 15:18-20

October 17 Ignatius of Antioch

Jeremiah 9:1-9; Psalm 28; Romans 8:18-25; John 12:23-26

October 18 **Saint Luke**

Ecclesiasticus 38:1-4, 6-10, 12-14; Psalm 147 or 147:1-7; 2 Timothy 4:5-13; Luke 4:13-21

October 19 Henry Martyn

Isaiah 49:1-7; Psalm 98; Romans 1:8-15; John 4:21-26

October 20 Cornelius the Centurion

Isaiah 56:6-8; Psalm 29; Acts 11:1-18; Luke 13:22-29

October 23 **Saint James of Jerusalem**

Acts 15:12-22a; Psalm 1; 1 Corinthians 15:1-11; Matthew 13:54-58

October 25 Tabitha (Dorcas) of Joppa

Leviticus 19:32-37; Psalm 101:104; Acts 9:36-42; Matthew 25:1-13

October 26 Alfred

Wisdom 6:1-11; Psalm 21:1-7; 2 Thessalonians 2:13-17; Luke 6:43-49

October 28 **Saint Simon and Saint Jude**

Deuteronomy 32:1-4; Psalm 119:89-96; Ephesians 2:13-22; John 15:17-27

October 29 James Hannington and his Companions

Ecclesiasticus 3:17-24; Psalm 124; 1 Peter 3:14-22; Matthew 10:37-42

October 30 Maryam of Qidun

Hosea 11:1-4, 8-9; Psalm 31:15-24; Romans 8:31-39; John 8:1-11

November 1 **All Saints**

Year A, B, and C of the Revised Common Lectionary

November 2 All Souls/All the Faithful Departed

Wisdom 3:1-9; Psalm 130; 1 Thessalonians 4:13-18; John 5:24-27

November 3 Richard Hooker

Ecclesiasticus 44:10-15; Psalm 37:1-9; 1 Corinthians 2:6-16; John 17:18-23

November 4 [Adeline e Blanchard Tyler and her companions]

Isaiah 58:1-12; Psalm 103:1-6; Romans 16:1-2, 25-27; Matthew 14:13-21

November 6 William Temple

Exodus 22:21-27; Psalm 119:97-104; Philippians 2:12-13; John 1:1-14

November 7 Willibrord

2 Kings 2:19-25; Psalm 105:1-5; Acts 1:1-9; Luke 18:1-8

November 8 Ammonius

1 Samuel 10:20-27; Psalm 24; James 3:1-12; Matthew 23:1-12

November 9 Richard Rolle, Walter Hilton, and Margery Kempe

Job 26:1-14; Psalm 63:1-8; Romans 11:33-36; Mark 4:35-41

November 10 Leo of Rome

Jeremiah 38:1-6; Psalm 77:11-15; 2 Timothy 1:6-12; Matthew 5:13-19

November 11 Martin of Tours

Hosea 2:18-23; Psalm 11; Galatians 6:1-2; Matthew 25:31-46

November 12 Charles Simeon

Amos 6:1-7; Psalm 108:106; Ephesians 3:7-12; Matthew 22:1-14

November 14 The Consecration of Samuel Seabury

1 Samuel 8:1-22; Psalm 110:1-4; Acts 1:15-26; Matthew 9:35-38

November 15 Herman of Alaska

2 Kings 4:38-41; Psalm 148:7-14; 2 Timothy 1:3-7; Luke 9:46-48

November 16 Margaret of Scotland

Proverbs 31:10-20; Psalm 139:10-17; 2 John 1-9; Matthew 13:44-46

November 17 Hugh of Lincoln

Tobit 6:1-6; Psalm 15; Titus 2:7-8, 11-14; Mark 13:32-37

November 18 Hilda of Whitby

Proverbs 6:20-23; Psalm 122; Ephesians 4:1-6; Matthew 19:27-30

November 19 Elizabeth of Hungary

Tobit 12:8-10; Psalm 112; 2 Corinthians 8:7-15; Luke 12:32-34

November 20 Edmund

2 Kings 11:1-8; Psalm 7:1-10; Ephesians 6:10-17; Matthew 10:16-22

November 21 Mechthilde of Hackeborn and Gertrude the Great

1 Samuel 1:21-28; Psalm 119:41-48; Acts 2:42-47; Luke 10:38-42

November 22 Clive Staples Lewis

Proverbs 23:15-18; Psalm 139:1-9; 1 Peter 1:3-9; John 16:7-15

November 23 Clement of Rome

1 Chronicles 23:28-32; Psalm 78:1-7; Colossians 2:6-15; Luke 6:37-45

November 24 Catherine of Alexandria, Barbara of Nicomedia, and Margaret of Antioch

Judith 12:16-13:12; Psalm 43; Romans 8:31-39; Matthew 5:1-12

November 25 James Otis Sargent Huntington

Nehemiah 5:1-12; Psalm 34:1-8; Galatians 6:14-18; John 6:34-38

November 28 Kamehameha and Emma of Hawaii

Micah 4:1-4; Psalm 33:12-22; Acts 17:22-31; Matthew 25:14-30

November 30 **Saint Andrew the Apostle**

Deuteronomy 30:11-14; Psalm 19 or 19:1-6; Romans 10:8b-18; Matthew 4:18-22

December 1 Charles de Foucauld

Habakkuk 3:17-19; Psalm 73:24-29; James 1:1-11; John 16:25-33

December 2 Channing Moore Williams

Isaiah 49:22-23; Psalm 96:1-7; Acts 1:1-9; Luke 10:1-12

December 3 Francis Xavier

Ecclesiasticus 2:1-7; Psalm 62; 1 Corinthians 9:16-23; Mark 16:15-20

December 4 John of Damascus

Wisdom 16:20-26; Psalm 118:14-21; Romans 6:1-11; Luke 17:20-21

December 5 Clement of Alexandria

1 Samuel 12:20-25; Psalm 34:9-14; Colossians 1:11-20; John 6:57-63

December 6 Nicholas of Myra

1 Kings 17:7-16; Psalm 145:8-13; 1 John 4:13-18; Mark 10:13-16

December 7 Ambrose of Milan

1 Kings 21:17-29; Psalm 27:1-5; Acts 4:23-31; Luke 12:35-40

December 8 Nicholas Ferrar

Proverbs 1:20-33; Psalm 127; Galatians 6:7-10; Matthew 13:47-52

December 11 Frederick Howden, Jr.

Jeremiah 17:14-17; Psalm 18:1-6, 18-20; 1 Corinthians 15:12-22; John 10:11-18

December 12 Francis de Sales and Jane de Chantal

Judges 6:11-24; Psalm 111; James 3:13-18; Mark 12:41-44

December 13 Lucy of Syracuse

Esther 4:9-16; Psalm 131; Revelation 19:5-8; John 1:9-14

December 14 John of the Cross

1 Kings 19:9-19; Psalm 121; Colossians 4:2-6; John 16:12-22

December 15 Nino of Georgia

2 Kings 5:1-14; Psalm 17:6-10; Philippians 1:12-18; Luke 13:10-17

December 17 Dorothy L. Sayers

Judges 3:15-30; Psalm 19; 1 Corinthians 12:4-11; John 21:1-9

December 20 Katharina von Bora

Isaiah 55:6-11; Psalm 46; Romans 3:21-28; John 15:1-11

December 21 **Saint Thomas the Apostle**

Habakkuk 2:1-4; Psalm 126; Hebrews 10:35-11:1; John 20:24-29

December 25 **The Nativity of our Lord Jesus Christ**

I. Isaiah 9:2-4, 6-7; Psalm 96 or 96:1-4, 11-12; Titus 2:11-14; Luke 2:1-14 (15-20)

II. Isaiah 62:6-7, 10-12; Psalm 97 or 97:1-4, 11-12. Titus 3:4-7. Luke 2:(1-14) 15-20

III. Isaiah 52:7-10; Psalm 98 or 98:1-6; Hebrews 1:1-12; John 1:1-14

December 26 **Saint Stephen**

Jeremiah 26:1-9, 12-15; Psalm 31 or Psalm 31:1-5; Acts 6:8-7:2a, 51c-60; Matthew 23:34-39

December 27 **Saint John**

Exodus 33:18-23; Psalm 92 or 92:1-4, 11-14; 1 John 1:1-9; John 21:19b-24

December 28 **Holy Innocents**

Jeremiah 31:15-17; Psalm 124; Revelation 21:1-7; Matthew 2:13-18

December 29 Thomas Becket

Wisdom 6:1-8; Psalm 5:1-7; Romans 5:1-11; Luke 4:1-13

December 31 Frances Joseph Gaudet

Lamentations 3:26-36; Psalm 146; Acts 16:25-34; Luke 4:14-21

Subcommittee on Liturgical Music

Members

Dr. Marty Wheeler Burnett, Chair	Nebraska, VI	2027
Dr. Michael Boney	Colorado, VI	2024
Mr. Patrick Fennig	Connecticut, I	2027
Mr. Ellis Montes	Texas, VII	2024
The Rev. Yuri Rodriguez	Indianapolis, V	2027
The Rt. Rev. Pierre Whalon	Convocation of Episcopal Churches in Europe, II	2024
The Rt. Rev. Terry White	Kentucky, IV	2024

Representation at General Convention

Deputy Mark Childers is authorized to receive non-substantive amendments to this Report at the General Convention.

Acknowledgements

*The Subcommittee on Liturgical Music worked with several groups and individuals throughout the biennium. We would like to thank a few colleagues by name. **Dr. Lyn Loewi**, President of the Women’s Sacred Music Project, was instrumental in bringing Resounding Voices to fruition. **Bishop Terry White** and the **Diocese of Kentucky** matched the GCO grant to the Resounding Voices project. **Airié Stuart**, Senior Vice President and Publisher of Church Publishing Inc., worked with the subcommittee and consulted on publishing questions. **Dr. Geoffrey Williams**, Assistant Professor of Church Music and Director of St. Mary’s Chapel at Nashotah House, moderated one of our focus groups. Two of our committee members, **The Rev. Yuri Rodriguez** and **Dr. Marty Wheeler Burnett** moderated the focus groups at The School of Theology at Sewanee (University of the South) and Virginia Theological Seminary, respectively. The focus group participants were vital in obtaining accurate data in our process. Thank you.*

Mandate

2022 - Canon I.1.2.n.2

2. A Standing Commission on Liturgy and Music. The Custodian of the Book of Common Prayer shall be a member *ex officio* with voice, but without vote. It shall be the duty of the Commission to:

- i. Discharge such duties as shall be assigned to it by the General Convention as to policies and strategies concerning the common worship of this Church.
- ii. Collect, collate, and catalogue material bearing upon possible future revisions of the Book of Common Prayer.
- iii. Cause to be prepared and to present to the General Convention recommendations concerning the Lectionary, Psalter, and offices for special occasions as authorized or directed by the General Convention or House of Bishops.
- iv. Recommend to the General Convention authorized translations of the Holy Scripture from which the Lessons prescribed in the Book of Common Prayer are to be read.
- v. Receive and evaluate requests for consideration of individuals or groups to be included in the Calendar of the Church year and make recommendations thereon to the General Convention for acceptance or rejection.
- vi. Collect, collate, and catalogue material bearing upon possible future revisions of The Hymnal 1982 and other musical publications regularly in use in this Church, and encourage the composition of new musical materials.
- vii. Cause to be prepared and present to the General Convention recommendations concerning the musical settings of liturgical texts and rubrics, and norms as to liturgical music and the manner of its rendition.
- viii. At the direction of the General Convention, to serve the Church in matters pertaining to policies and strategies concerning Church music.
- ix. Collaborate with the Secretary of General Convention to make final edits to the text of resolutions adopted by General Convention that establish new or revised liturgical materials, and to arrange for their publication. For the sole purpose of this collaboration, members of the Standing Commission on Liturgy and Music are exempt from the terms of office set forth in I.1.2.b and shall remain in office until their successors are appointed and take office.
- x. Oversee and maintain the official liturgical website of The Episcopal Church through a subcommittee whose members shall include the Chair of the Standing Commission on Liturgy and Music or an authorized deputy who is a member of the Standing Commission on Liturgy and Music; the Custodian of the Standard Book of Common Prayer; at least one other Standing Commission on Liturgy and Music member; the Secretary of General Convention or an authorized deputy of the Secretary; a representative from the publisher affiliated with the Church Pension Fund; at least two members with skill in website design and coding, to be appointed by the Chair of the Standing Commission on Liturgy and Music.

Resolution 2022-A126 A Resolution Supporting a Comprehensive Review of the Book Of Common Prayer, The Hymnal 1982, and other approved liturgical material

Resolved, That this 80th General Convention instruct the Standing Commission on Liturgy and Music to examine all the language of the Book of Common Prayer, The Hymnal 1982 and other approved liturgical material in regard to the colonialist, racist and white supremacist, imperialist and nationalistic language and content and develop proposals for amending texts; and be it further

Resolved, That in order to accomplish this review it is authorized to convene gatherings of Episcopalians of Color and of a wide variety of ethnicities and from all the countries where The Episcopal Church is gathered, for this review and for the discernment of cultural assumptions in these resources and materials; and be it further

Resolved, That the Standing Commission on Liturgy and Music communicate its learnings ongoing and widely throughout the next two years; and be it further

Resolved, That this 80th General Convention request the Joint Standing Committee on Program, Budget, and Finance to allocate \$100,000 for the implementation of this resolution.

Resolution 2022-D010 Resolution Regarding Inclusion of a hymn in Honor of Dr. Artemisia Bowden

Resolved, That this 80th General Convention Of The Episcopal Church authorize for trial use the new hymn in Honor of Dr. Artemisia Bowden and that that hymn be integrated into the Black Saints section of the Lift Every Voice and Sing II Hymnal of The Episcopal Church.

Summary of Work

2022-A126

The SCLM Subcommittee on Liturgical Music focused its efforts on responding to A126, “A Resolution Supporting a Comprehensive Review of the Book of Common Prayer, *The Hymnal 1982*, and other approved liturgical material” regarding “colonialist, racist and white supremacist, imperialist and nationalistic language and content” and the development of proposals for amending texts. With approximately one year to accomplish this work and no funding appropriated, the scope of this resolution was narrowed. The subcommittee researched newly revised versions of problematic hymn texts. Focus groups were conducted at three Episcopal seminaries: Nashotah House, The School of Theology at Sewanee (The University of the South), and Virginia Theological Seminary. These groups were composed of seminarians selected both for their interest in hymnody and diversity in terms of demographic data. Focus group participants sang two versions of several hymns – the version found

in *The Hymnal 1982* and, for comparison, a revised version of the same text. Revised versions were selected from recently published hymnals, addressing the issues outlined in the resolution. Participants responded to a series of written survey questions and then engaged in group discussion.

Results from the focus groups yielded the following data:

- For every hymn presented, at least 25% of participants felt the need for an alternate version
- 31-50% indicated that they would use one or more of the alternate versions in their ministry settings
- 75% articulated a general need for revision of problematic hymn texts

Additionally, narrative notes summarizing comments in the group discussions articulated two shared concerns:

- Updating the language of older hymns should be balanced with the creation of new hymnody
- When updating text, care must be taken to maintain both theological and poetic integrity

In studying the results from the focus groups, the subcommittee determined that a digital collection of alternate versions of hymns for experimental use would be helpful. In discussions with Church Publishing Incorporated, a plan emerged to create a digital collection of alternate versions of hymns addressing the issues raised in A126. These would be available for download through RiteSong for use at the discretion of the diocesan bishop. This would make the texts widely available for use and evaluation in the next triennium. It would also provide statistical data by tracking usage through the number of downloads. To this end, the SCLM is proposing a resolution to authorize and fund this work.

The subcommittee members recognize that, due to the emphasis on problematic texts in *The Hymnal 1982*, the focus of our work has been on English language hymns. Issues of language and translation are complex, especially related to the issues raised in A126. We agree that focusing on the creation of new hymns with more inclusive, expansive language and imagery may be the most effective approach going forward.

Creation of a Supplement to *The Hymnal 1982*

In addition to revising problematic hymn texts, both focus groups and subcommittee members articulated a need for new hymnody. In the twenty years since *The Episcopal Church* published a hymnal supplement, many new texts and tunes have been created. There is an expressed desire for more global hymnody, as well as additional hymns on topical issues such as creation care. Through our work and study, a clear consensus emerged around a new hymnal supplement that would make these materials available to the church for use and evaluation. In fulfilling the SCLM's mandate to collect and curate materials for eventual hymnal revision, a new supplement will provide excellent musical and textual resources representing the breadth and diversity of *The Episcopal Church*. To that end, the

SCLM is offering a resolution authorizing the creation of a hymnal supplement, along with educational material for clergy and musicians to enable effective use of these materials in worship.

Support of Resounding Voices Hymnal Supplement

At the March 2023 meeting of The Standing Commission on Liturgy and Music, the group voted to show support of the *Resounding Voices* project in the form of a \$2,500 grant. In addition, The Right Reverend Terry Allen White, VIII Bishop of Kentucky, stepped up and matched that amount with another gift of \$2,500. This request was granted from the Office of General Convention and funds were distributed to the Women’s Sacred Music Project and their President, Dr. Lyn Loewi.

In celebration of the twentieth anniversary of the hymnal *Voices Found*, the Women’s Sacred Music Project in partnership with The Hymn Society in the United States and Canada is curating *Resounding Voices*, a new collection of hymns, songs, and liturgical music by people who identify as women. In their search, they long to address ideas, “which touch our hearts, fire our imagination, and encourage us to action.” They also hope to honor the spiritual legacy of *Voices Found* by connecting with issues of moral justice in our day.

The Standing Commission on Liturgy and Music has been in communication with the Women’s Sacred Music Project throughout the publishing process to offer support in any way possible.

2022-D010

This resolution concerning a hymn in honor of Dr. Artemisia Bowden was referred to our subcommittee. While inclusion in *Lift Every Voice and Sing II* was not possible from a publishing standpoint, the subcommittee commended it for local trial use as stated in the resolution.

Proposed Resolutions

A130 Developing alternative hymn texts

Resolved, That the 81st General Convention authorize the Standing Commission on Liturgy and Music to work during the forthcoming triennium to develop a digital collection of alternative versions of hymns that address issues of problematic wording to be made available to congregations for their use with permission from their bishop and to be published by Church Publishing Incorporated; and be it further

Resolved, That efforts begun in the last triennium to identify and create such alternative texts be expanded to include communities that do not use the English language; and be it further

Resolved, That the sum of \$200,000 be appropriated for this work.

EXPLANATION

Resolution 2022-A126 directed the Standing Commission on Liturgy and Music to examine the Book of Common Prayer, the Hymnal 1982, and other approved liturgical materials regarding “colonialist, racist, white supremacist, imperialistic, and nationalistic language.” The Subcommittee on Liturgical Music conducted surveys of various hymns in English and identified some that contain such textual features. Furthermore, alternative wordings were suggested.

This resolution asks that this work continue, and that non-anglophone materials be added for the same consideration.

A131 Creation of a Supplement to The Hymnal 1982

Resolved, That the 81st General Convention authorize the Standing Commission on Liturgy and Music to work with Church Publishing Incorporated during the forthcoming triennium to develop a new hymnal supplement; and be it further

Resolved, That the sum of \$ 750,000 be appropriated for this work.

EXPLANATION

In the twenty years since the most recent Episcopal hymnal supplement was published, there has been a vast amount of creative work in the composition of hymns, hymn tunes, and service music. Furthermore, there is a need for greater availability of global hymnody for use in worship. The inclusion of more hymns and service music by women and other underrepresented voices also remains a priority as the church seeks greater equity, diversity, and inclusion. Finally, more hymns addressing underrepresented topics such as creation care are urgently needed.

The canons charge the SCLM with collecting material bearing upon possible future revisions of The Hymnal 1982 and other musical publications, as well as encouraging the composition of new musical materials. A hymnal supplement would further this work by making new hymns and service music widely available for use and evaluation. Budgeted funding would include hiring professional consultants whose work would be overseen by the commission, as well as all pre-publication work and costs, including evaluation and selection of materials, producing digital manuscripts, and handling copyright permissions.

STANDING COMMISSION ON STRUCTURE, GOVERNANCE, CONSTITUTION AND CANONS

Members

Mr. Christopher Hayes, Chair	California, VIII	2024
The Rt. Rev. Frank Logue, Vice-Chair	Georgia, IV	2027
The Rev. Dr. Adam Trambley, Secretary	Northwestern Pennsylvania, III	2024
The Hon. A. Joseph Alarid	Rio Grande, VII	2027
The Rev. Canon Valerie Balling	New Jersey, II	2024
The Rt. Rev. Jennifer Baskerville-Burrows	Indianapolis, V	2024
Ms. Jane Cislucyis	Northern Michigan, V	2027
Ms. Nancy Mahoney Cohen	El Camino Real, VIII	2027
The Rt. Rev. Mark Edington	Convocation of Episcopal Churches in Europe, II	2027
Sra. Carmen Figueroa	Puerto Rico, II	2024
Mr. Ryan Kusumoto	Hawaii, VIII	2024
Mr. Thomas Little	Vermont, I	2024
The Rt. Rev. Craig Loya	Minnesota, VI	2027
The Rev. Dr. Steve Pankey	Kentucky, IV	2027
Mr. William Powel	Ohio, V	2024
Mr. Russell Randle	Virginia, III	2027
The Rt. Rev. Sean Rowe	Northwestern Pennsylvania, III	2024
Ms. Diane Sammons	Newark, II	2027
The Rev. Rachel Taber-Hamilton	Olympia, VIII	2027
The Rev. Dr. Marisa Tabizon Thompson	Nebraska, VI	2024
Ms. Mary Kostel, Representative of the Presiding Bishop	Washington, III	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024
Mr. Michael Glass, Representative of the President of the House of Deputies	San Joaquin, VIII	2024
The Ven. Aaron Perkins, Liaison of Executive Council	Maine, I	2024

Changes in Membership

Jane Cislucyis resigned from the Standing Commission on February 12, 2023.

Bishop Phoebe Roaf resigned from the Standing Commission on January 6, 2023. Bishop Mark Ediginton was appointed to fill the vacancy.

Representation at General Convention

Deputies Christopher Hayes and Adam Trambley, and Bishops Frank Logue and Craig Loya are authorized to receive non-substantive amendments to this Report at the General Convention

Acknowledgements

The Standing Commission would like to thank all who have submitted information to us, whether in person, via Zoom, in writing, or otherwise. We could not do this work without the many generous people who care deeply about our church and share their expertise and perspectives with us.

We would like to thank the Rev. Dr. Molly James for all that she does, often thanklessly and behind the scenes, to facilitate the work of this Standing Commission and the wider Church.

Finally, we thank Jesus for creating a universe with a certain governance and structure that we hope our feeble efforts reflect, even if through a glass darkly.

Mandate

2022 - Canon I.1.2.n.1

1. A Standing Commission on Structure, Governance, Constitution and Canons. It shall be the duty of the Commission to:

i. Review such proposed amendments to the Constitution and Canons as may be submitted to the Commission, placing each such proposed amendment in proper Constitutional or Canonical form, including all amendments necessary to effect the proposed change. For amendments not in proper form, the Standing Commission on Constitution and Canons may direct the submitting Commission to the canonical and Rules of Order requirements for amendments to the Constitution and Canons so the submitting Commission may revise its amendment to proper form. The Commission shall express its views with respect to the substance of any such proposal only to the proponent thereof; *provided, however*, that no member of the Commission shall, by reason of membership, be deemed to be disabled from expressing, before a Legislative Committee or on the floor of the General Convention, personal views with respect to the substance of any such proposed amendment.

ii. Conduct a continuing comprehensive review of the Constitution and Canons with respect to their internal consistency and clarity, and on the basis of such a review, propose to the General Convention such technical amendments to the Constitution and Canons as in the opinion of the Commission are necessary or desirable in order to achieve such consistency and clarity without altering the substance of any Constitutional and Canonical provisions; *provided, however*, that the Commission shall propose, for the consideration of the appropriate Legislative Committees of the General Convention, such amendments to the Constitution and Canons as in the opinion of the Commission are technically desirable but involve a substantive alteration of a Constitutional or Canonical provision.

iii. On the basis of such review, suggest to the Domestic and Foreign Missionary Society and to the Executive Council of the General Convention such amendments to their respective By-laws as in the opinion of the Commission are necessary or desirable in order to conform the same to the Constitution and Canons.

iv. Conduct a continuing and comprehensive review and update of the authorized “Annotated Constitution and Canons for the Government of the Protestant Episcopal Church in the United States of America otherwise known as The Episcopal Church” to reflect actions of General Convention which amend the Constitution and Canons and, in the discretion of the Commission, develop other materials which are appropriate to the purpose of the “Annotated Constitution and Canons,” and facilitate the publication of this document and related materials. The Commission

may provide or support forums to promote commentary, discussion, and understanding of the Constitution and Canons.

v. Discharge such other duties as shall from time to time be assigned by the General Convention.

vi. Study and make recommendations concerning the structure of the General Convention and of The Episcopal Church. It shall, from time to time, review the operation of the several Committees, Commissions, and Boards to determine the necessity for their continuance and the effectiveness of their functions and to bring about a coordination of their efforts. Whenever a proposal is made for the creation of a new Committee, Commission, Board or Agency, it shall, wherever feasible, be referred to this Standing Commission for its consideration and advice.

vii. Conduct a continuing and comprehensive review and update of the Title IV training materials, including drafting such changes as are necessitated by changes to these Constitution and Canons, or as may be deemed appropriate to maintain such training materials in a current and effective status.

Summary of Work

Title IV

One of the primary concerns of the Standing Commission every triennium is updating Title IV canons based on the needs of the Church. During the first year of this Biennium, the Commission considered a number of issues that were referred to it by the 80th General Convention or had been received by other sources. Events during the summer of 2023, including public requests for a review of Title IV by the Presiding Bishop and President of the House of Deputies, broadened the scope and urgency of this work.

In this Blue Book Report, the Commission is proposing the resolutions listed below to the 81st General Convention for adoption. Additionally, in October 2023, the Commission created a mechanism for additional Churchwide feedback on Title IV issues. Our hope is to have an initial compilation of this feedback available with further resolution recommendations in a forthcoming Supplemental Blue Book. We also know that many of the issues we address, including Title IV, take more time and energy to solve than is available between General Conventions, so we will continue working on these matters in preparation for further consideration at the 82nd General Convention.

Title IV Database

The Standing Commission again emphasizes the importance of a Title IV database to accurately track Title IV usage across the Church and provide the information needed for on-going changes to Title IV to meet the needs of the Church. This database is in our Canons (IV.19.30.d) and is therefore required to be funded. The Standing Commission urges all parties involved in budgeting and allocation to assure that funding is available for this important work.

Report on 2022-B005: Restorative Covenant

Canon I of Title IV sets ambitious and worthy aspirations for the Church's process for Ecclesiastical Discipline. Experience has demonstrated that appointment of a Conciliator – defined in Canon IV.10.4 as “a person skilled in dispute resolution techniques and without conflict of interest in the matter” – can be an effective avenue for reaching the aspirations of the Title, particularly if utilized early in the discipline process. The current text of Canon IV.10, Of Conciliation, suggests that a conciliation is successful only if an Accord is reached. This amendment expands the understanding of a successful conciliation to include one that results in resolution of all or some of the issues in a matter by way of a “Restorative Covenant” between the Complainant(s) and the Respondent, to which the Reference Panel must consent, and the later violation of which would constitute an Offense. Hopefully, this amendment would expand the opportunity for resolutions that promote “healing, repentance, forgiveness, restitution, justice, amendment of life and reconciliation.” The Commission proposes

Resolution A052 Amend Canon IV.2, Canon IV.4.1.d, and Canon IV.10.3 to add Restorative Covenant as a possible outcome of Conciliation.

Intake Officers Limitations and Pastoral Care Provisions

The Commission looked at the role of Intake Officers, and issues that have arisen in the Church. Due to their potential roles later in Title IV proceedings, various persons should not serve as a Title IV Intake Officer. The role of pastoral care in Title IV is also important, and pastoral care providers are one of the roles that should not serve as an Intake Officer. Additionally, bishops should ensure appropriate pastoral care to all affected persons and communities. The Commission proposes Resolution A053 Amend Canons IV.2, IV.8.1, and IV.8.5 Regarding the Role of Intake Officers.

Church Attorneys

Three important changes are proposed here in relation to the Church Attorney. First, currently most of the Church Attorney's functions are described in Canon IV.2, the definitional canon, rather than being included in the canons addressing specific steps in the disciplinary process where the Church Attorney has a role. This amendment moves the descriptions of the Church Attorney's functions into the canons describing those steps (Investigation, Conference Panel, and Hearing Panel). Second, the Investigation canon lacks clarity on when the Church Attorney supervises the Investigator. This amendment clarifies that when the Reference Panel calls for an Investigation, then it supervises the Investigation at that stage, and when the Church Attorney calls for investigation, then the Church Attorney supervises the Investigation. Third, currently the canons give the Church Attorney sole discretion to decline to advance a disciplinary matter. Concerns have been raised about such discretion residing in only one person, particularly in a disciplinary system that is structured generally to include multiple voices in decision-making. This amendment would require a Church Attorney who declines to advance a matter to set out reasons for that decision and requires others in the Title IV process to accept or reject that decision. The Commission proposes Resolution A054 Amend Canons IV.2, IV.11, IV.12, and IV.13 regarding the Church Attorney.

Investigators

The Commission is proposing changes to the canons to clean up inconsistencies in Canon IV.2 regarding the appointment and role of Investigators. These changes also remove a few portions of the definition of Investigators in Canon IV.2 and place them in the procedural portion of the canons and bring the canons in line with current practice in the case of a Title IV process involving a bishop. The Commission proposes Resolution A055 Amend Canons IV.2, IV.11.1, and IV.17.2.e regarding Investigators.

Report on 2022-A118: Election of Members of the Court of Review

In its current form, subsections i, ii, and iii apply only to section d. This was not the intention of the Standing Commission on Structure, Governance, Constitution, and Canons when it presented this to the 80th General Convention. Rather, these three sections were meant to apply to all of Canon IV.5. By renumbering these as e, f, and g, it now applies broadly to Bishops, Presbyters, Deacons, and Lay members of the Court of Review. The Commission proposes [Resolution A056 Amend Canon IV.5.4 on the Election of Members of the Court of Review](#).

Suspension of a Bishop

These proposed changes offer greater parity between an order or accord involving a suspension of priests and deacons, described in Canon IV.19.7, and that of a bishop. During suspensions of a bishop longer than six months, the default is now the termination of the pastoral relationship. This change would also mean a Bishop Provisional, serving under Canon III.13, who is suspended could then be removed without a vote of convention. The Commission proposes [Resolution A057 Amend Canon IV.17.6 regarding Suspension of a Bishop](#).

Pastoral Response Without Disciplinary Action

The Commission believed that the current term “take no action” in the canons did not accurately describe a pastoral response. This proposed resolution adds language to clarify this distinction. The Commission proposes [Resolution A058 Amend Canons IV.6.8, IV.6.10, and IV.11.3 on Pastoral Response Without Disciplinary Action](#).

Report on 2022-D035: Amend Canon IV.19.23: Of General Provisions [Expenses]

The Commission rejected the proposal to require dioceses to pay fees for respondents in certain Title IV cases.

Report on 2022-D036: Intake Officers’ Initial Intake

The Commission is considering the proposals in this resolution as it continues looking at best practices for and appropriate canons about Intake Officers.

Report on 2022-D037: Amend Canon IV.11.2 Of Investigations

The Commission rejected this proposal as it would place our necessary work at the mercy of the vagaries of the wide variety of civil jurisdictions in which our church finds itself.

Report on 2022-D040: Amend Canons IV.13.4, IV.13.11.e, IV.13.13, IV.14.6

This proposed resolution would require certain media reports to be made when a Title IV matter is dismissed. Given the complicated issues involved, the Commission will look at these issues more comprehensively in future meetings.

Report on 2022-D053 Amend various Canons in Titles IV and V to provide for Notices of Sentences

The Commission expresses its gratitude to Deputy Paul Ambos (New Jersey) and other interested parties whose close reading of the canons helps us maintain consistency and accuracy throughout our governing documents. Given the abbreviated two-year timeframe between General Conventions and our other work, the Commission has not been able to thoroughly review and make proposals based on this referred resolution.

Office of Pastoral Development

A Subcommittee met with The Rt. Rev. Todd Ousley, Bishop of Pastoral Development for the Office of Pastoral Development (OPD) and a member of the Presiding Bishop's Staff, at an in-person meeting in Cleveland, OH, in March 2023. He spoke to us about the various aspects of his work in the OPD, including intake of Title IV offenses, oversight and support of Bishops and Dioceses in transition, and the pastoral support for all these situations and people. It is a considerable amount of work for one individual and a part-time support staff person. It has also put Bishop Ousley in a position where his different roles were, from time to time, in conflict.

Bishop Ousley informed the Subcommittee about Resolution 2022-A143, that directed Program, Budget and Finance to fund a "senior staff position" for the Office of Pastoral Development. While the Resolution was Concurred, the initiative was not funded. At a recent Executive Council meeting, Executive Council allocated \$125,000 to fund the Intake Officer as referenced in Canon IV.17.2.b, and another \$125,000 was allocated from the Presiding Bishop's Office line item, for a total of \$250,000. The decision was to fund the Intake Officer as a full-time position in order to increase the pool of candidates with the necessary skills. The Intake Officer will be another member of the Presiding Bishop's Staff and report directly to the Presiding Bishop, as well as be in consultation with Bishop Ousley and the OPD to coordinate efforts, especially for pastoral care.

Because the position of Intake Officer is already defined in the Canons, there was a question of whether the funding of this position fulfilled the request of 2022-A143, or if another senior staff position could also be requested. The Subcommittee encouraged Bishop Ousley to make the budgetary request for both the Intake Officer and a Canon for Pastoral Development for the 2025-2028 TEC Budget. A Canon for Pastoral Development would allow for a more coordinated and thorough response in all aspects of the OPD's work.

The Reverend Barbara Kempf was hired as the Title IV Intake Officer for bishops and began work in August of 2023. The Intake Officer reports directly to the Presiding Bishop to separate that work from the OPD.

Also at the March meeting, the Subcommittee and Bishop Ousley discussed Resolution 2022-D095 and its directive to review the mandate of the OPD. Some of our previous discussion of 2022-A143 and resulting actions by Executive Council and the Presiding Bishop's Office intertwined with the expressed need for process change and funding. Additionally, the Resolution requests review of consistency in Title IV processes for all ordained persons, the process for Bishops and Dioceses in transition, and other pastoral care oversight.

The Subcommittee requested that Bishop Ousley prepare a presentation on the process of Bishop transitions, in all the various ways that occurs. He was invited to the SCGSCC's May Zoom meeting, which he did attend and during which he made such a presentation. As much of the process for election of a bishop is directed by diocesan canons, the most important resource the OPD needs is time. Bishop Ousley encouraged dioceses entering a transition to give themselves three years for that process, which requires bishops considering retirement or completing their ministry to inform their Standing Committees as early as possible.

One suggestion for a change to TEC canons was to have all episcopal nominees be required to complete the medical and psychological examinations prior to the election rather than after [III.11.3.a.2]. Such a change could ensure the health and stability of the candidates and may have significant financial ramifications. The Subcommittee did not pursue making such changes during this biennium and recommends that the SCGSCC consider such a change in the future.

At the SCGSCC in-person meeting in October of 2023, several subcommittees on Title IV Commission continued working on canonical changes that addressed concerns from Resolution 2022-D095, including parity of the disciplinary process for bishops, priests and deacons, the process for episcopal transition, the placement of Interim or Bishops Provisional, and clarity of roles within the process.

Report on Navajoland

A Subcommittee of the Standing Commission worked with Navajoland on issues, procedures, and canons for the facilitation of an election of a new bishop. This work so far has involved significant listening to the needs, hopes, and dreams of this area mission's elders and people, and the often painful history between this area mission and the wider church. In order to ensure the full consideration of their perspectives, we are delaying our report until it can be reflected upon, edited, and approved by the leaders of the area mission as well as the Standing Commission.

Other Issues Taken Up By The Standing Commission

Create an Official List of Recognized Religious Orders and Christian Communities

Members of Executive Council asked the Standing Commission to look at the issue of which Religious Orders should be listed on episcopalchurch.org. While the Standing Commission does not deal with the management issue of what is and is not on the website, this query raised a number of questions.

First, there is no official list that is canonically required to be kept of religious orders and Christian communities. Canon III.14.1 and III.14.2 give the Standing Committee on Religious Communities of the House of Bishops the duty to approve religious orders and Christian communities, so we are proposing to amend those canons to give that Standing Committee the obligation to maintain an official list, as well.

Second, the Standing Commission had a number of other questions which are taking on greater importance as the number of these communities has been increasing in recent years. We requested that the Executive Council follow up with the Standing Committee on Religious Orders to take the next steps in this work and bring back to this Standing Commission any requests for canonical or constitutional changes.

The Commission proposed the following resolution to ensure an official list of recognized religious orders: Resolution A059 Create an Official List of Recognized Religious Orders and Christian Communities.

Report on 2022-A034: Mandate of the Standing Commission on Structure, Governance, Constitution, and Canons

Resolution 2022-A034 was referred to the Commission. The referred resolution would have added language to Canon I.1.2.n.1.vi that would authorize review of “Agencies and other governing bodies.” The Commission decided not to add the term “Agencies” as that term is not defined in the canons and not to add the term “other governing bodies” as broader than likely intended. The Commission instead recommends adding the language “and bodies for which The Episcopal Church may be legally responsible.” The objective is to encourage responsible oversight of all bodies within The Episcopal Church. The Commission also recommends changing “shall” to “will” in connection with referrals to this Standing Commission. These changes are in proposed resolution: A060 Amend Canon I.1.2.n.1.vi: Standing Commission on Structure, Governance, Constitution and Canons.

Report on 2022-A039: Testimonials

Resolution 2022-A039 was referred to the Commission. The resolution would have amended Canon III.11.3.c to change the requirement for signatures required for Standing Committee testimonials to

give consent to a Bishop's election, limiting the requirement to testimonials required by this canon, as opposed to "this Title," which would have also applied to testimonials to ordinations of deacons and priests. The Standing Commission decided instead to standardize the requirements for Standing Committee testimonials for ordinations, and to place that language into the Standing Committee Canon, I.12.3, rather than scattered in the ordination canons so that Standing Committee members can more easily find the rule. The language essentially moves the language about a majority signing Testimonials and signatures in the counterparts found in the current Canon III.11.3.c. into the canon governing Standing Committees. The Standing Commission also recommends placing cross-references to Canon I.12.3 in each of the ordination canons requiring testimonials. The Commission proposes A061 Amend the following Canons I.12.3, III.6.6.c, III.8.6.d., III.8.6.7.c., III.10.d, 3, III.11.3.b., and III.11.3.c. based on 2022-A039.

Report on 2022-A046: Not adding by Action of the Anglican Consultative Council

Resolution 2022-A046 was referred to the Commission. The Commission recommended to reject the proposed resolution and to keep the Canon as is without the recommended change of "by action of the Anglican Consultative Council". The Commission recommends rejection because it is unclear how the meaning would change by adding the phrase "by action of the Anglican Consultative Council," given that most of the inhabited world is included in some Province of the Anglican Communion. Additionally, the Commission believes that this canon is not an appropriate vehicle to address the larger questions of the ACC's authority and its role in the Anglican Communion.

Report on 2022-A047: Mutual Ministry Reviews

Resolution 2022-A047 was referred to the Commission. The Commission recommended specifying the completion date for the mutual ministry review. By adding the deadline as "not later than twelve months before the next scheduled General Convention" it provides the specificity for the reviews that are not impacted by changes in dates to General Convention. The Commission proposes A062 Amend Canon I.4.2.j Mutual Ministry Review.

Report on 2022-A112 Term of Office of the Presiding Bishop

The Standing Commission looked the issues of electing a Presiding Bishop who may not be able to serve a nine-year term before reaching the mandatory retirement age and the added wrinkle of a delayed General Convention resulting in a Presiding Bishop reaching mandatory retirement age. The Commission proposes Resolution A063 Amend Canons I.2.2: Term of Office of Presiding Bishop.

Report on 2022-A162, 2022-A163, and 2022-A164: Resolutions on Pension and Medical Costs

Resolutions 2022-A162, 2022-A163, 2022-A164 were referred to the 81st General Convention. Each of these resolutions proposed in one way or another that the non-white and small congregations referenced in this resolution be relieved of some of their clergy pension and medical costs. The

Commission feels that such changes would not solve the underlying problem of the viability of these congregations.

Report on 2022-C002: Annual Diocesan Audits

The Commission considered 2022-C002, referred to it by General Convention for review. This proposed resolution would have amended Title I, Canon 7.1.f., which requires annual audits of dioceses, to instead require an annual review and an audit every three years. The Commission understood that the rationale for the proposed change was to reduce the financial burden on smaller dioceses with lower income and fewer assets.

The Commission does not recommend changing the canon, because the proposed language would have applied to all dioceses, including those whose income and resources make annual audits a much more modest burden, and because the actual expense savings from this change would reportedly be minimal since all three years would need to be examined by an audit.

The Commission, however, has recommended to Executive Council that some financial relief be provided to Dioceses with annual income of less than an amount to be determined by Executive Council, and that such relief be provided in the form of an increased exemption of Diocesan income from the mandatory 15% assessment, and that the increase correspond to the estimated cost of the annual audit, as determined by Executive Council.

Report on 2022-A154: Budget of the Archives

Resolution 2022-A154 was referred to the Commission. The Commission took no further action on this resolution. The language in 2022-A154 indicated that the expenses of the Archives shall be shared by the General Convention and the Executive Council. The Commission took no further action as this matter was clarified with the passing of 2022-A048 which indicates that the expenses of the Archives of The Episcopal Church shall be included in the budget for The Episcopal Church.

Report on 2022-C008: Changing Mandatory Retirement Age

Resolution 2022-C008 was referred to the Commission. The Commission recommends rejecting this resolution. The Commission agreed that there does not appear to be a need to change the current mandatory retirement age of 72.

Data Collection

During our November 2022 meeting at the Maritime Center, the Standing Commission was invited to join with the House of Deputies Committee on the State of the Church to discuss issues of research and data analysis in the Church. We listened to the desires of the State of the Church Committee, which included a canonical requirement to report, the appointment of a new staff member to conduct

research, and various canonical changes. A subcommittee worked with various others to discern how The Episcopal Church might expand on the data analysis work already ongoing. After nearly a year of conversations and back and forth with State of the Church, the Standing Commission determined that an annual report from the Presiding Bishop coupled with strong encouragement from General Convention to make data informed decisions at all levels of the Church was the best approach. In cooperation with the Committee on the State of the Church, the Commission proposes Resolution [A051 Amend Canons I.2.4 Data Collection for the Church](#).

Capturing Clergy Records

The Commission looked at two issues regarding clergy records: terminology and the capturing of all clergy on record in The Episcopal Church. Regarding terminology, the consecration is a part of the larger ordination service for Bishops, not a service on its own, so the language of consecration has been removed from canons related to Bishops. The change to this canon is in line with a move in the canons to refer to ordained bishops. Under the current system for reporting on clergy, there are cracks into which people fall if they are outside of a small handful of categories. This language expands the areas of status that must be kept on record and reported while also applying it to all three orders of ordination. The Commission proposes Resolution [A064 Amend Canon I.1.6.d Capturing Clergy Records](#).

Accuracy in Gender Language in Canon III

As TEC recognizes a diversity of gender expressions and understandings, the binary language of “men and women” in Title III is not inclusive and does not accurately reflect our understanding of gender. The Commission proposes Resolution [A065 Amend Canon III.1.3](#).

Creation of a Custodian for the Constitution and Canons of The Episcopal Church

Given changes in technology, the Constitution and Canons of The Episcopal Church are no longer published in only one form. Creating a Custodian would designate an individual to ensure that physical, PDF, and other publications are all accurate. Having a Custodian also designates one person to be responsible compiling changes made after each General Convention. The Standing Commission proposes [A066 – Amend Canon V.1 to create a Custodian for the Constitution and Canons of the Episcopal Church](#).

Anti-racism Terminology

The Commission reviewed a proposed resolution to Amend Canons III.6.5.g.4, III.7.11.a.2, III.8.5.h.4, III.9.13.a.2, III.10.1.c.4, and III.12.8.a.2 to Use Approved Common Terminology to Describe Anti-Racism Work. As in other instances of Canonical review, the Commission is assisting the proposers to submit their resolution in proper canonical form without making recommendations on content.

Proposed Resolutions

Title IV Resolutions

A052 – Amend Canon IV.2, Canon IV.4.1.d, and Canon IV.10.3 to add Restorative Covenant as a possible outcome of Conciliation

Resolved, That the 81st General Convention amend Canon IV.2 to read as follows.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon IV.2 (following definition of **Respondent**):

Restorative Covenant shall mean an agreement between one or more Complainants and a Respondent that results from a Conciliation under Canon IV.10.3, that resolves some or all of the issues in a matter pending under this Title, and to which the Reference Panel has consented.

<Proposed amended resolution text showing exact changes being made:>

Canon IV.2 be amended to add the following, in appropriate alphabetical order:

Restorative Covenant shall mean an agreement between one or more Complainants and a Respondent that results from a Conciliation under Canon IV.10.3, that resolves some or all of the issues in a matter pending under this Title, and to which the Reference Panel has consented.

And be it further

Resolved, That the 81st General Convention amend Canon IV.4.1.d to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon IV.4.1.d:

d. abide by the requirements of any applicable Accord or Order; any applicable Pastoral Direction, restriction on ministry, or placement on Administrative Leave issued under Canon IV.7; or Restorative Covenant entered into under Canon IV.10.3;

<Proposed amended resolution text showing exact changes being made:>

- d. abide by the requirements of any applicable Accord or Order; ~~or~~ any applicable Pastoral Direction, restriction on ministry, or placement on Administrative Leave issued under Canon IV.7; or Restorative Covenant entered into under Canon IV.10.3;

And be it further.

Resolved, That the 81st General Convention amend Canon IV.10.3 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (*****) to see the version showing all deleted and added text.>

Canon IV.10.3 be amended as follows:

Sec. 3. A conciliation may result in an Accord as provided in Canon IV.14 or a Restorative Covenant as defined in Canon II.2. Within a reasonable time after commencement of a conciliation, the Conciliator shall report the results of the conciliation to the Reference Panel, which shall refer the matter under Canon IV.6.8 as appropriate. If the conciliation results in a Restorative Covenant that, in the Reference Panel's judgment, resolves all of the issues in a pending matter, the Reference Panel shall dismiss the matter.

<Proposed amended resolution text showing exact changes being made:>

Canon IV.10.3 be amended as follows:

~~If the A conciliation may result in is successful in reaching agreement among the parties on a suitable resolution of all issues, an Accord will be prepared as provided in Canon IV.14 or a Restorative Covenant as defined in Canon II.2. If conciliation cannot be achieved within~~ Within a reasonable time after commencement of a conciliation, the Conciliator shall report the results of the conciliation to the Reference Panel, which shall refer the matter under Canon IV.6.8 as appropriate. ~~, the Conciliator will report such to the Bishop Diocesan, and the matter will be referred back to the Reference Panel.~~ If the conciliation results in a Restorative Covenant that, in the Reference Panel's judgment, resolves all of the issues in a pending matter, the Reference Panel shall dismiss the matter.

EXPLANATION

Canon I of Title IV sets ambitious and worthy aspirations for the Church’s process for Ecclesiastical Discipline. Experience has demonstrated that appointment of a Conciliator – defined in Canon IV.10.4 as “a person skilled in dispute resolution techniques and without conflict of interest in the matter” – can be an effective avenue for reaching the aspirations of the Title, particularly if utilized early in the discipline process. The current text of Canon IV.10, Of Conciliation, suggests that a conciliation is successful only if an Accord is reached. This amendment expands the understanding of a successful conciliation to include one that results in resolution of all or some of the issues in a matter by way of a “Restorative Covenant” between the Complainant(s) and the Respondent, to which the Reference Panel must consent, and the later violation of which would constitute an Offense. Hopefully, this amendment would expand the opportunity for resolutions that promote “healing, repentance, forgiveness, restitution, justice, amendment of life and reconciliation.”

A053 Amend Canons IV.2, IV.8.1, and IV.8.5 regarding the Role of Intake officers

Resolved, That the 81st General Convention amend Canons IV.2 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon IV.2

Intake Officer means one or more persons designated by the Bishop Diocesan after consultation with the Disciplinary Board, unless otherwise selected pursuant to diocesan canons, to whom information regarding Offenses is reported. The following individuals may not serve as an Intake Officer: (a) any Bishop; (b) any member of the Standing Committee of the Diocese where the matter is pending; or (c) any person that holds an office, is employed by, or maintains a compensation relationship with the Diocese where the matter is pending in which such employment, office, or other compensation relationship includes responsibility for the deployment of Clergy or pastoral care of members of the Clergy.

<Proposed amended resolution text showing exact changes being made:>

Canon IV.2

Intake Officer ~~shall mean~~ *means* one or more persons designated by the Bishop Diocesan after consultation with the Disciplinary Board, unless otherwise selected pursuant to diocesan canons, to whom information regarding Offenses is reported. *The following individuals may not serve as an Intake*

Officer: (a) any Bishop; (b) any member of the Standing Committee of the Diocese where the matter is pending; or (c) any person that holds an office, is employed by, or maintains a compensation relationship with the Diocese where the matter is pending in which such employment, office, or other compensation relationship includes responsibility for the deployment of Clergy or pastoral care of members of the Clergy.

And be it further.

That the 81st General Convention amend Canon IV.8.1 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon 8: Of Pastoral Response

Sec. 1. The Bishop Diocesan shall provide for appropriate pastoral response whenever any report is made to the Intake Officer. Such pastoral response shall embody respect, care, and concern for affected persons and Communities. The response shall be designed so as to promote healing, repentance, forgiveness, restitution, justice, amendment of life and reconciliation among all involved or affected. If the report involves an allegation of Sexual Misconduct, the Bishop Diocesan shall provide for a professional pastoral care assessment in order to provide an appropriate pastoral response. The pastoral response will include all affected persons and communities. The pastoral care response will be based on the professional pastoral care assessment.

<Proposed amended resolution text showing exact changes being made:>

Canon 8: Of Pastoral Response

Sec. 1. The Bishop Diocesan shall provide for appropriate pastoral response whenever any report is made to the Intake Officer. Such pastoral response shall embody respect, care, and concern for affected persons and Communities. The response shall be designed so as to promote healing, repentance, forgiveness, restitution, justice, amendment of life and reconciliation among all involved or affected. If the report involves an allegation of Sexual Misconduct, the Bishop Diocesan *shall* ~~is encouraged to~~ provide for a professional pastoral care assessment in order to provide an appropriate pastoral response. The pastoral response will include all affected persons and communities. The pastoral care response will be based on the professional pastoral care assessment ~~pastoral response that will include the provision of assistance by a mental health professional with appropriate skills for meaningful response to affected persons.~~

And be it further.

Resolved, that the 81st General Convention amend Canon IV.8.5 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon IV.8.5

Sec. 5. The Bishop Diocesan may designate one or more persons to be responsible for the implementation of the pastoral response. Such person must not be the Intake Officer. The duties of such person may include coordination of pastoral care and coordination of communications between the Bishop Diocesan and Advisors.

<Proposed amended resolution text showing exact changes being made:>

Canon IV.8.5

Sec. 5. The Bishop Diocesan may designate ~~a person~~ *one or more persons* to be responsible for the implementation of the pastoral response. Such person ~~may~~ *must not* be the Intake Officer. The duties of such person may include coordination of pastoral care and coordination of communications between the Bishop Diocesan and Advisors.

EXPLANATION

Due to their potential roles later in Title IV proceedings, various persons should not serve as a Title IV Intake Officer. The role of pastoral care in Title IV is important, and pastoral care providers are one of the roles that should not serve as an Intake Officer. Additionally, bishops should ensure appropriate pastoral care to all affected persons and communities.

A054 Amend Canons IV.2, IV.11, IV.12, and IV.13 regarding the Church Attorney

Resolved, That Canon IV.2 shall be amended as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Church Attorney shall mean one or more attorneys selected pursuant to Diocesan Canons to represent the Church in proceedings as provided in this Title. The Diocesan Canons may provide a process for the

removal of a Church Attorney for cause. A Church Attorney shall perform all functions on behalf of the Church necessary to advance proceedings under this Title. In representing the Church, a Church Attorney may consult with the president of the Disciplinary Board at any time after the matter has been referred out of the Reference Panel, and, when the prosecution of the case may impact the mission, life, or ministry of the Church, with the Bishop Diocesan.

<Proposed amended resolution text showing exact changes being made:>

Church Attorney shall mean one or more attorneys selected pursuant to Diocesan Canons to represent the Church in proceedings as provided in this Title. The Diocesan Canons may provide a process for the removal of a Church Attorney for cause. A Church Attorney shall perform all functions on behalf of the Church necessary to advance proceedings under this Title ~~and shall have the following powers, in addition to the powers and duties otherwise provided in this Title: (a) to receive and review the Intake Officer's report; (b) to conduct investigations and oversee the Investigator and, in connection with such investigations, to have access to the personnel, books and records of the Diocese and its constituent parts; and to receive and review the reports of the Investigator; (c) to determine, in the exercise of the Church Attorney's discretion, whether the reported information, if true, would be grounds for discipline; and (d) to exercise discretion consistent with this Title and the interests of the Church by declining to advance proceedings or by referring any matter back to the Intake Officer or the Bishop Diocesan for pastoral response in lieu of disciplinary action.~~ In representing the Church, a Church Attorney may consult with the president of the Disciplinary Board at any time after the matter has been referred out of the Reference Panel, and, when the prosecution of the case may impact the mission, life, or ministry of the Church, with the Bishop Diocesan.

And be it further.

Resolved, That Canon IV.11 shall be amended as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (*****) to see the version showing all deleted and added text.>

Canon 11: Of Investigations

Sec. 1. In each Diocese there shall be one or more Investigators.

Sec. 2. The Reference Panel or the Church Attorney may request the Investigator to investigate all facts pertinent to the factual claims of the intake report. The Investigator shall use appropriate investigative means, with due consideration to pastoral sensitivities, and shall complete the investigation as expeditiously as possible.

Sec. 3. An Investigator engaged by the Reference Panel shall present the findings of the investigation in writing to the Reference Panel. The Reference Panel may meet with the Investigator and shall consider the report to determine whether to: (a) take no action other than appropriate pastoral responses pursuant to Canon IV.8; (b) refer the matter to the Bishop Diocesan for consideration of proceedings under Canon IV.9; (c) refer the matter to conciliation pursuant to Canon IV.10; (d) require further investigation; or (e) refer the matter to the Conference Panel pursuant to Canon IV.12, or to the Hearing Panel pursuant to Canon IV.13. The determination shall be approved by a majority vote of the Reference Panel.

Sec. 4. If the Reference Panel's determination is to refer for further investigation, the Investigator shall make such further investigation as the Reference Panel directs and shall submit a supplemental report of findings to the Reference Panel. The Reference Panel shall then reconvene and proceed as provided in Canon IV.11.3.

Sec. 5. An Investigator engaged by the Church Attorney shall be overseen by the Church Attorney and shall present the findings of the investigation to the Church Attorney in a format(s) required by the Church Attorney. In connection with such investigations, the Church Attorney and, at the discretion of the Church Attorney, the Investigator shall have access to the personnel, books and records of the Diocese and its constituent parts.

Sec. 6. All investigations shall be confidential until such time as information obtained may be utilized by the Church Attorney, the Bishop Diocesan or the Panels. All persons, prior to being interviewed by the investigator, shall be advised of the confidential nature of the investigation and when such information may be shared during the course of the proceedings.

<Proposed amended resolution text showing exact changes being made:>

Canon 11: Of Investigations

Sec. 1. In each Diocese there shall be one or more Investigators.

Sec. 2. *The Reference Panel or the Church Attorney may request* ~~Upon referral of an intake report~~ the Investigator shall to investigate all facts pertinent to the factual claims of the intake report. The Investigator shall use appropriate investigative means, with due consideration to pastoral sensitivities, and shall complete the investigation as expeditiously as possible.

Sec. 3. ~~The~~ *An Investigator engaged by the Reference Panel* shall present the findings of the investigation in writing to the Reference Panel. The Reference Panel may meet with the Investigator and shall consider the report to determine whether to: (a) take no action other than appropriate

pastoral responses pursuant to Canon IV.8; (b) refer the matter to the Bishop Diocesan for consideration of proceedings under Canon IV.9; (c) refer the matter to conciliation pursuant to Canon IV.10; (d) require further investigation; or (e) refer the matter to the Conference Panel pursuant to Canon IV.12, or to the Hearing Panel pursuant to Canon IV.13. The determination shall be approved by a majority vote of the Reference Panel.

Sec. 4. If the *Reference Panel's* determination is to refer for further investigation, the Investigator shall make such further investigation as the Reference Panel directs and shall submit a supplemental report of findings to the Reference Panel. The Reference Panel shall then reconvene and proceed as provided in Canon IV.11.3.

Sec. 5. *An Investigator engaged by the Church Attorney shall be overseen by the Church Attorney and shall present the findings of the investigation to the Church Attorney in a format(s) required by the Church Attorney. In connection with such investigations, the Church Attorney and, at the discretion of the Church Attorney, the Investigator shall have access to the personnel, books and records of the Diocese and its constituent parts.*

Sec. 5-6. All investigations shall be confidential until such time as information obtained may be utilized by the Church Attorney, the Bishop Diocesan or the Panels. All persons, prior to being interviewed by the investigator, shall be advised of the confidential nature of the investigation and when such information may be shared during the course of the proceedings.

And be it further.

Resolved, That Canon IV.12.1 shall be amended as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon 12: Of Conference Panels

Sec. 1. Upon referral of a matter to a Conference Panel, the president of the Disciplinary Board shall forward to the Church Attorney the intake report, all of the Investigator's reports and any other writings or other file materials created or collected by the Disciplinary Board or any panel thereof during the intake, investigative or referral process. After reviewing this material, the Church Attorney shall determine whether to proceed with the matter or decline to advance proceedings in the matter.

If proceeding with the matter, the Church Attorney shall prepare a written statement, describing each alleged Offense separately, with reasonable particularity sufficient to apprise the Respondent of the acts, omissions or conditions which are the subject of the proceedings. The Church Attorney shall then

forward the materials received from the president of the Disciplinary Board, together with the written statement, to the Conference Panel.

If declining to advance proceedings in the matter, the Church Attorney shall refer the matter back to the Reference Panel in a written decision stating the reasons therefor. This document and any related conversation between the Church Attorney and the Reference Panel shall remain confidential between the Church Attorney and the Reference Panel. The Reference Panel shall then consider the options for action set out in Canon IV.6.8 and Canon IV.11.3.

<Proposed amended resolution text showing exact changes being made:>

Canon 12: Of Conference Panels

Sec. 1. Upon referral of a matter to a Conference Panel, the president of the Disciplinary Board shall forward to the Church Attorney the intake report, all of the Investigator's reports and any other writings or other file materials created or collected by the Disciplinary Board or any panel thereof during the intake, investigative or referral process. *After reviewing ~~From~~ this material, the Church Attorney shall determine whether to proceed with the matter or decline to advance proceedings in the matter.*

If proceeding with the matter, the Church Attorney shall prepare a written statement, describing each alleged Offense separately, with reasonable particularity sufficient to apprise the Respondent of the acts, omissions or conditions which are the subject of the proceedings. The Church Attorney shall then forward the materials received from the president of the Disciplinary Board, together with the written statement, to the Conference Panel.

If declining to advance proceedings in the matter, the Church Attorney shall refer the matter back to the Reference Panel in a written decision stating the reasons therefor. This document and any related conversation between the Church Attorney and the Reference Panel shall remain confidential between the Church Attorney and the Reference Panel. The Reference Panel shall then consider the options for action set out in Canon IV.6.8 and Canon IV.11.3.

And be it further.

Resolved, That Canon IV.13.1 shall be amended as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (*****) to see the version showing all deleted and added text.>

Canon 13: Of Hearing Panels

Sec. 1. When the Reference Panel decides pursuant to Canon IV.11.3 to refer a matter to the Hearing Panel, the President of the Disciplinary Board shall within three days of the decision notify the Disciplinary Board and the Church Attorney. When the Conference Panel decides to refer a matter to the Hearing Panel, the president of the Conference Panel shall within three days of that decision notify the president of the Disciplinary Board and the Church Attorney.

Sec. 2. Within 10 days of receipt of a referral from the Conference Panel, or 30 days when from the Reference Panel, to the Hearing Panel for proceedings, the Church Attorney shall determine whether to proceed with the matter or decline to advance proceedings in the matter.

a. If proceeding with the matter, the Church Attorney shall provide to the Hearing Panel the statement of the alleged Offense(s), updated as needed. No other material from any prior proceedings under Title IV shall be provided to the Hearing Panel. Upon receipt of the Church Attorney's communication, the Hearing Panel shall within seven days issue a notice to the Respondent, to the Respondent's Advisor, to Respondent's counsel, if any, and to the Church Attorney.

i. The notice shall describe the nature and purpose of the proceeding, contain a copy of the written statement prepared by the Church Attorney, disclose the names of all persons to whom the notice is sent, advise the Respondent that a written response to the notice must be filed by the Respondent with the Hearing Panel within thirty days of the mailing date of the notice and advise the Respondent of the provisions of Canon IV.19.6.

ii. A copy of the notice shall be sent to the Complainant and to the Complainant's Advisor.

iii. Unless additional time is approved for good cause by the Hearing Panel, the Respondent shall within 30 days of the mailing date of the notice file with the Hearing Panel and deliver to the Church Attorney a written response signed by the Respondent.

b. If declining to advance proceedings in the matter, the Church Attorney shall submit to the members of the Conference Panel and the Bishop Diocesan a written decision stating the reasons therefor, which may include (1) the unavailability of clear and convincing evidence sufficient to overcome the presumption of innocence set out in Canon IV.19.16, or (2) the Church Attorney's opinion that resolution of the matter through the mechanism of a Hearing Panel would not be the

most effective means for achieving the goals of Title IV. If the Church Attorney's stated reason for declining to advance proceedings is the latter reason, the Church Attorney shall also propose with reasonable specificity alternate mechanisms for resolving the matter and justification therefor. In evaluating the Church Attorney's submission, the Conference Panel shall provide the Intake Officer, the Complainant, the Complainant's Advisor, the Complainant's counsel, if any, the Respondent, the Respondent's Advisor, the Respondent's counsel, if any, the Bishop Diocesan, the Chancellor, and the Church Attorney an opportunity to be heard on the matter. After its review and in consultation with the Bishop Diocesan, the Conference Panel shall issue a decision (a) dismissing all or some of the issues in the matter, potentially with conditions such as compliance with a Pastoral Direction issued by the Bishop Diocesan, or (b) rejecting the Church Attorney's declination and ordering the matter to proceed. If dismissing all or some of the issues of the matter, the Conference Panel, with the assistance of legal counsel pursuant to IV.19.22, shall issue an Order explaining the decision and stating that the dismissal is with or without prejudice.

<Proposed amended resolution text showing exact changes being made:>

Canon 13: Of Hearing Panels

Sec. 1. *When the Reference Panel decides pursuant to Canon IV.11.3 to refer a matter to the Hearing Panel, the President of the Disciplinary Board shall within three days of the decision notify the Disciplinary Board and the Church Attorney. When the Conference Panel decides to refer a matter to the Hearing Panel, the president of the Conference Panel shall within three days of that decision notify the president of the Disciplinary Board and the Church Attorney.*

Sec. 2. *Within 10 days of receipt of a referral from the Conference Panel, or 30 days when from the Reference Panel, to the ~~for~~ Hearing Panel for proceedings, the Church Attorney shall determine whether to proceed with the matter or decline to advance proceedings in the matter.*

a. *If proceeding with the matter, the Church Attorney shall provide to the Hearing Panel the statement of the alleged Offense(s), updated as needed. No other material from any prior proceedings under Title IV shall be provided to the Hearing Panel. Upon receipt of the Church Attorney's communication, the Hearing Panel shall within seven days issue a notice to the Respondent, to the Respondent's Advisor, to Respondent's counsel, if any, and to the Church Attorney.*

a i. *The notice shall describe the nature and purpose of the proceeding, contain a copy of the written statement prepared by the Church Attorney, disclose the names of all persons to whom the notice is sent, advise the Respondent that a written response to the notice must be*

filed by the Respondent with the Hearing Panel within thirty days of the mailing date of the notice and advise the Respondent of the provisions of Canon IV.19.6.

b ii. A copy of the notice shall be sent to the Complainant and to the Complainant's Advisor.

c iii. Unless additional time is approved for good cause by the Hearing Panel, the Respondent shall within 30 days of the mailing date of the notice file with the Hearing Panel and deliver to the Church Attorney a written response signed by the Respondent.

b. *If declining to advance proceedings in the matter, the Church Attorney shall submit to the members of the Conference Panel and the Bishop Diocesan a written decision stating the reasons therefor, which may include (1) the unavailability of clear and convincing evidence sufficient to overcome the presumption of innocence set out in Canon IV.19.16, or (2) the Church Attorney's opinion that resolution of the matter through the mechanism of a Hearing Panel would not be the most effective means for achieving the goals of Title IV. If the Church Attorney's stated reason for declining to advance proceedings is the latter reason, the Church Attorney shall also propose with reasonable specificity alternate mechanisms for resolving the matter and justification therefor. In evaluating the Church Attorney's submission, the Conference Panel shall provide the Intake Officer, the Complainant, the Complainant's Advisor, the Complainant's counsel, if any, the Respondent, the Respondent's Advisor, the Respondent's counsel, if any, the Bishop Diocesan, the Chancellor, and the Church Attorney an opportunity to be heard on the matter. After its review and in consultation with the Bishop Diocesan, the Conference Panel shall issue a decision (a) dismissing all or some of the issues in the matter, potentially with conditions such as compliance with a Pastoral Direction issued by the Bishop Diocesan, or (b) rejecting the Church Attorney's declination and ordering the matter to proceed. If dismissing all or some of the issues of the matter, the Conference Panel, with the assistance of legal counsel pursuant to IV.19.22, shall issue an Order explaining the decision and stating that the dismissal is with or without prejudice.*

EXPLANATION

Three important changes were accomplished. First, currently most of the Church Attorney's functions are described in Canon IV.2, the definitional canon, rather than being included in the canons addressing specific steps in the disciplinary process where the Church Attorney has a role. This amendment moves the descriptions of the Church Attorney's functions into the canons describing those steps (Investigation, Conference Panel, and Hearing Panel). Second, the Investigation canon lacks clarity on when the Church Attorney supervises the Investigator. This amendment clarifies that when the Reference Panel calls for an Investigation, then it supervises the Investigation at that stage, and when the Church Attorney calls for investigation, then the Church Attorney supervises the Investigation. Third, currently the canons give the Church Attorney sole discretion to decline to advance a disciplinary matter. Concerns have been raised about such discretion residing in only one person, particularly in a

disciplinary system that is structured generally to include multiple voices in decision-making. This amendment would require a Church Attorney who declines to advance a matter to set out reasons for that decision and requires others in the Title IV process to accept or reject that decision.

A055 Amend Canons IV.2, IV.11.1, and IV.17.2.e regarding Investigators

Resolved, That the 81st General Convention amend Canons IV.2 as follows.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon IV.2

Investigator shall mean a person having (a) sufficient knowledge, skill, experience and training to conduct investigations under this Title and (b) familiarity with the provisions and objectives of this Title.

<Proposed amended resolution text showing exact changes being made:>

Investigator shall mean a person having (a) sufficient knowledge, skill, experience and training to conduct investigations under this Title and (b) familiarity with the provisions and objectives of this Title. ~~Investigators shall be appointed by the Bishop Diocesan in consultation with the president of the Disciplinary Board. The Investigator acts under the direction of the Reference Panel until a referral is made pursuant to Canon IV.11.3; after such referral, the Investigator shall be overseen by and report to the Church Attorney.~~

And be it further.

Resolved, That the 81st General Convention amend Canon IV.11.1 as follows.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon IV.11.1

Sec. 1. In each Diocese there shall be one or more Investigators. An Investigator is appointed by and acts under the direction of the Reference Panel until a referral is made pursuant to Canon IV.11.3; after

such referral, an Investigator may be appointed by and shall be overseen by and report to the Church Attorney.

<Proposed amended resolution text showing exact changes being made:>

Sec. 1. In each Diocese there shall be one or more Investigators. *An Investigator is appointed by and acts under the direction of the Reference Panel until a referral is made pursuant to Canon IV.11.3; after such referral, an Investigator may be appointed by and shall be overseen by and report to the Church Attorney.*

And be it further.

Resolved, That the 81st General Convention amend Canon IV.17.2.e as follows.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon IV.17.2.e

e. Investigator shall mean any person who is qualified to serve as an Investigator under this Title, selected by the Reference Panel or Church Attorney.

<Proposed amended resolution text showing exact changes being made:>

e. Investigator shall mean any person who is qualified to serve as an Investigator under this Title, selected by ~~the Disciplinary Board for Bishops~~ *the Reference Panel or Church Attorney.*

EXPLANATION

This change cleans up inconsistencies in Canon IV.2 regarding the appointment and role of Investigators. It removes a few portions of the definition of Investigators in Canon IV.2 and places them in the procedural portion of the canons and brings the canons in line with current practice in the case of a Title IV process involving a bishop.

A056 – Amend Canon IV.5.4 on the Election of Members of the Court of Review

Resolved, That the 81st General Convention amend Canon IV.5.4 to read as follows.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

IV.5.4

d. The Clergy and lay members and alternates on the Court of Review shall be elected by the House of Deputies at a regular meeting of the General Convention.

e. Except for a member filling a vacancy, the term of office of a member of the Court of Review shall begin at the adjournment of the regular meeting of the General Convention at which the member was elected and expire upon the adjournment of the second regular meeting of the General Convention following.

f. Members of the Court of Review shall serve staggered terms of office such that the terms of one-half of the members expire at each regular meeting of the General Convention. The Joint Standing Committee on Nominations shall make its nominations in a manner that supports this staggering of terms.

g. Any member who has served 12 or more consecutive years shall not be eligible for reelection to the Court of Review until the next regular meeting of the General Convention following the one at which the member was not eligible for reelection to the Court of Review. A person's service as an alternate shall not count against these term limitations.

And renumbering all that follows.

<Proposed amended resolution text showing exact changes being made:>

d. The Clergy and lay members and alternates on the Court of Review shall be elected by the House of Deputies at a regular meeting of the General Convention.

~~4~~ **e.** Except for a member filling a vacancy, the term of office of a member of the Court of Review shall begin at the adjournment of the regular meeting of the General Convention at which the member was elected and expire upon the adjournment of the second regular meeting of the General Convention following.

~~2~~ **f.** Members of the Court of Review shall serve staggered terms of office such that the terms of one-half of the members expire at each regular meeting of the General Convention. The

Joint Standing Committee on Nominations shall make its nominations in a manner that supports this staggering of terms.

~~3~~ g. Any member who has served 12 or more consecutive years shall not be eligible for reelection to the Court of Review until the next regular meeting of the General Convention following the one at which the member was not eligible for reelection to the Court of Review. A person's service as an alternate shall not count against these term limitations.

EXPLANATION

In its current form, subsections 1, 2, and 3 apply only to section d. This was not the intention of the Standing Commission on Structure, Governance, Constitution, and Canons when it presented this to the 80th General Convention. Rather, these three sections were meant to apply to all of Canon IV.5. By renumbering these as e, f, and g, it now applies broadly to Bishops, Presbyters, Deacons, and Lay members of the Court of Review.

A057 Amend Canon IV.17.6 regarding Suspension of a Bishop

Resolved, That the 81st General Convention amend Canons IV.17.6 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

IV.17.6

Sec. 6. Where the Respondent is a Bishop, an Accord or Order may provide for the suspension or deposition of the Respondent. In such event, the Sentence of suspension or deposition shall be pronounced by the president of the Disciplinary Board for Bishops. The president shall have no discretion to decline to pronounce the Sentence or to pronounce a lesser Sentence. Where an Accord provides for the suspension or deposition of a Respondent who is a Bishop, the president shall pronounce Sentence within thirty days after the date on which the Conciliator or the president signs the Accord. Where an Order provides for the suspension or deposition of a Respondent who is a Bishop, the president shall pronounce Sentence not sooner than forty days following the issuance of the Order and not later than sixty days following the issuance of the Order. Notwithstanding anything in this section to the contrary, no Sentence shall be pronounced while an appeal of the matter is pending. However, the president may, while an appeal is pending, place restrictions upon the exercise of the Respondent's ministry, or place the Respondent on Administrative Leave, or continue any such restriction or Administrative Leave as was in effect at the time of the issuance of the Order. Unless otherwise expressly provided in writing in the restriction on ministry or Sentence of suspension, a

Bishop under a restriction of Ministry or Sentence of suspension shall not exercise any authority of his or her office and the Standing Committee will serve as the Ecclesiastical Authority. A Sentence of suspension of a Bishop lasting longer than six months shall terminate the pastoral relation between the Bishop and the Diocese unless (i) the Standing Committee by two-thirds vote requests of the Disciplinary Board for Bishops within thirty days that the relation continue and (ii) the Disciplinary Board for Bishops approves such request, except in the case of a Sentence of suspension for a Bishop Provisional serving as provided by Canon III.13 which shall result in the termination of the agreement with the Diocese. If the pastoral relation has not been terminated, religious services and sacramental ministrations shall be provided for that Diocese as though a vacancy exists. This Section shall not prohibit the application of Canon III.12.11.

<Proposed amended resolution text showing exact changes being made:>

Sec. 6. ~~The provisions of Canons IV.14.1.d and IV.14.6.c pertaining to recommendations that a Respondent be suspended or deposed from ministry shall not apply where the Respondent is a Bishop.~~ Where the Respondent is a Bishop, an Accord or Order may provide for the suspension or deposition of the Respondent. In such event, the Sentence of suspension or deposition shall be pronounced by the president of the Disciplinary Board for Bishops. The president shall have no discretion to decline to pronounce the Sentence or to pronounce a lesser Sentence. Where an Accord provides for the suspension or deposition of a Respondent who is a Bishop, the president shall pronounce Sentence within thirty days after the date on which the Conciliator or the president signs the Accord. Where an Order provides for the suspension or deposition of a Respondent who is a Bishop, the president shall pronounce Sentence not sooner than forty days following the issuance of the Order and not later than sixty days following the issuance of the Order. Notwithstanding anything in this section to the contrary, no Sentence shall be pronounced while an appeal of the matter is pending. However, the president may, while an appeal is pending, place restrictions upon the exercise of the Respondent's ministry, or place the Respondent on Administrative Leave, or continue any such restriction or Administrative Leave as was in effect at the time of the issuance of the Order. *Unless otherwise expressly provided in writing in the restriction on ministry or Sentence of suspension, a Bishop under a restriction of Ministry or Sentence of suspension shall not exercise any authority of his or her office and the Standing Committee will serve as the Ecclesiastical Authority. A Sentence of suspension of a Bishop lasting longer than six months shall terminate the pastoral relation between the Bishop and the Diocese unless (i) the Standing Committee by two-thirds vote requests of the Disciplinary Board for Bishops within thirty days that the relation continue and (ii) the Disciplinary Board for Bishops approves such request, except in the case of a Sentence of suspension for a Bishop Provisional serving as provided by Canon III.13 which shall result in the termination of the agreement with the Diocese. If the pastoral relation has not been terminated, religious services and sacramental ministrations shall be provided for that Diocese as though a vacancy exists. This Section shall not prohibit the application of Canon III.12.11.*

EXPLANATION

These proposed changes offer greater parity between an order or accord involving a suspension of priests and deacons, described in Canon IV.19.7, and that of a bishop, making termination of the pastoral relationship the default in both cases. This change would also mean a Bishop Provisional, serving under Canon III.13, who is suspended could then be removed without a vote of convention.

A058 Amend Canons IV.6.8, IV.6.10, and IV.11.3 on Pastoral Response Without Disciplinary Action

Resolved, That the 81st General Convention amend Canon IV.6.8 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (*****) to see the version showing all deleted and added text.>

IV.6.8

Sec. 8. The Reference Panel shall meet as soon as possible after receiving the intake report to determine how to refer the report. Referral options are (a) to conclude the matter with an appropriate pastoral response pursuant to Canon IV.8; (b) Conciliation pursuant to Canon IV.10; (c) investigation pursuant to Canon IV.11; (d) to the Conference Panel pursuant to Canon IV.12; or (e) referral for possible agreement with the Bishop Diocesan regarding terms of discipline pursuant to Canon IV.9. Referral decisions shall require the approval of a majority of the Reference Panel. The Reference Panel shall establish a schedule for each approved option and the President of the Disciplinary Board shall be responsible for monitoring each such schedule.

<Proposed amended resolution text showing exact changes being made:>

Sec. 8. The Reference Panel shall meet as soon as possible after receiving the intake report to determine how to refer the report. Referral options are (a) ~~no action required other than appropriate pastoral response pursuant to Canon IV.8;~~ *to conclude the matter with an appropriate pastoral response pursuant to Canon IV.8;* (b) Conciliation pursuant to Canon IV.10; (c) investigation pursuant to Canon IV.11; (d) to the Conference Panel pursuant to Canon IV.12; or (e) referral for possible agreement with the Bishop Diocesan regarding terms of discipline pursuant to Canon IV.9. Referral decisions shall require the approval of a majority of the Reference Panel. The Reference Panel shall establish a schedule for each approved option and the President of the Disciplinary Board shall be responsible for monitoring each such schedule.

And be it further.

Resolved, That the 81st General Convention amend Canon IV.6.10 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

IV.6.10

Sec. 10. If the determination of the Reference Panel is to conclude the matter with an appropriate pastoral response, the Panel shall notify the Complainant and the subject Member of the Clergy of the determination and the basis for the determination. If the referral is to conciliation, the provisions of Canon IV.10 shall apply. If the referral is to investigation, the provisions of Canon IV.11 shall apply. If the referral is to the Bishop Diocesan for possible Agreement and an Agreement is not reached within 90 days of the referral, the Reference Panel will re-refer the matter, in accordance with Canon IV.6.9.

<Proposed amended resolution text showing exact changes being made:>

Sec. 10. If the determination of the Reference Panel is to ~~take no action other than provide~~ an appropriate pastoral response, the Panel shall notify the Complainant and the subject Member of the Clergy of the determination and the basis for the determination ~~to take no action other than an appropriate pastoral response~~. If the referral is to conciliation, the provisions of Canon IV.10 shall apply. If the referral is to investigation, the provisions of Canon IV.11 shall apply. If the referral is to the Bishop Diocesan for possible Agreement and an Agreement is not reached within 90 days of the referral, the Reference Panel will re-refer the matter, in accordance with Canon IV.6.9.

And be it further.

Resolved, That the 81st General Convention amend Canon IV.11.3 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

IV.11.3

Sec. 3. The Investigator shall present the findings of the investigation in writing to the Reference Panel. The Reference Panel may meet with the Investigator and shall consider the report to determine whether to: (a) conclude the matter with an appropriate pastoral response pursuant to Canon IV.8; (b) refer the matter to the Bishop Diocesan for consideration of proceedings under Canon IV.9; (c) refer the matter to conciliation pursuant to Canon IV.10; (d) require further investigation; or (e) refer

the matter to the Conference Panel pursuant to Canon IV.12, or to the Hearing Panel pursuant to Canon IV.13. The determination shall be approved by a majority vote of the Reference Panel.

<Proposed amended resolution text showing exact changes being made:>

Sec. 3. The Investigator shall present the findings of the investigation in writing to the Reference Panel. The Reference Panel may meet with the Investigator and shall consider the report to determine whether to: (a) ~~take no action other than appropriate pastoral responses pursuant to Canon IV.8; conclude the matter with an appropriate pastoral response pursuant to Canon IV.8;~~ (b) refer the matter to the Bishop Diocesan for consideration of proceedings under Canon IV.9; (c) refer the matter to conciliation pursuant to Canon IV.10; (d) require further investigation; or (e) refer the matter to the Conference Panel pursuant to Canon IV.12, or to the Hearing Panel pursuant to Canon IV.13. The determination shall be approved by a majority vote of the Reference Panel.

EXPLANATION

The Commission believed that the current term “take no action” in the canons did not accurately describe a pastoral response. This proposed resolution adds language to clarify this distinction.

Other Resolutions

A059 Create an Official List of Recognized Religious Orders and Christian Communities

Resolved, That the 81st General Convention amend Canon III.14.1.b to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (*****) to see the version showing all deleted and added text.>

Title III.14.1

b. To be officially recognized, a Religious Order must have at least six professed members, and must be approved by the Standing Committee on Religious Communities of the House of Bishops and be registered with the Committee. The Standing Committee on Religious Communities will keep the official list of recognized Religious Orders.

<Proposed amended resolution text showing exact changes being made:>

Title III.14.1

b. To be officially recognized, a Religious Order must have at least six professed members, and must be approved by the Standing Committee on Religious Communities of the House of Bishops and be registered with the Committee. *The Standing Committee on Religious Communities will maintain the official list of recognized Religious Orders.*

And be it further.

That the 81st General Convention amend Canon III.14.2.b to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (*****) to see the version showing all deleted and added text.>

Title III.14.2

b. To be officially recognized such a Christian Community must have at least six full members in accordance with their Rule and Constitution, and must be approved by the Standing Committee on Religious Communities of the House of Bishops and be registered with the Committee. The Standing Committee on Religious Communities will keep the official list of recognized Christian Communities.

<Proposed amended resolution text showing exact changes being made:>

Title III.14.2

b. To be officially recognized such a Christian Community must have at least six full members in accordance with their Rule and Constitution, and must be approved by the Standing Committee on Religious Communities of the House of Bishops and be registered with the Committee. *The Standing Committee on Religious Communities will keep the official list of recognized Christian Communities.*

EXPLANATION

The Canons do not currently require the maintenance of a list of officially recognized Religious Orders and Christian Communities. Canon III.14.1 and III.14.2 give the Standing Committee on Religious Communities of the House of Bishops the duty to approve religious orders and Christian communities, so we are proposing to amend those canons to give that Standing Committee the obligation to maintain an official list, as well.

Ao6o Amend Canon I.1.2.n.1.vi: Standing Commission on Structure, Governance, Constitution and Canons

Resolved, That the 81st General Convention amend Canon I.1.2.n.1.vi.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

I.1.2.n.1.vi

vi. Study and make recommendations concerning the structure of the General Convention and of The Episcopal Church. It shall, from time to time, review the operation of the several Committees, Commissions, and Boards, and other governing bodies for which The Episcopal Church may be legally responsible to determine the necessity for their continuance and the effectiveness of their functions and, where appropriate, to bring about a coordination of their efforts. Whenever a proposal is made for the creation of a new, or changing of the affiliation of a, Committee, Commission, Board, or body for which The Episcopal Church may be legally responsible, it will, wherever feasible, be referred to this Standing Commission for its consideration and advice.

<Proposed amended resolution text showing exact changes being made:>

vi. Study and make recommendations concerning the structure of the General Convention and of The Episcopal Church. It shall, from time to time, review the operation of the several Committees, Commissions, and Boards, *and other governing bodies for which The Episcopal Church may be legally responsible* to determine the necessity for their continuance and the effectiveness of their functions and, *where appropriate*, to bring about a coordination of their efforts. Whenever a proposal is made for the creation of a new, *or changing of the affiliation of a*, Committee, Commission, Board, or ~~Agency~~ *body for which The Episcopal Church may be legally responsible*, it ~~it shall~~ *will*, wherever feasible, be referred to this Standing Commission for its consideration and advice.

EXPLANATION

Resolution 2022-A034 was referred to the Commission. The referred resolution would have added language to Canon I.1.2.n.1.vi that would authorize review of “Agencies and other governing bodies.” The Commission decided not to add the term “Agencies” as that term is not defined in the canons and not to add the term “other governing bodies” as broader than likely intended. The Commission instead recommends adding the language “and bodies for which The Episcopal Church may be legally responsible.” The objective is to encourage responsible oversight of all bodies within The Episcopal Church. The Commission also recommends changing “shall” to “will” in connection with referrals to this Standing Commission.

A061 Amend the following Canons I.12.3, III.6.6.c, III.8.6.d., III.8.6.7.c., III.10.d, 3, III.11.3.b., and III.11.3.c. based on 2022-A039

Resolved, That the 81st General Convention amend Canon I.12.3.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

I.12.3

Sec. 3. Any document required to be signed by members of the Standing Committee or by the Clerical members thereof, or by any other body consisting of several members may be signed in counterparts each of which shall be deemed an original. Testimonials required for ordination and required to be given by a Standing Committee under any of these Canons must be signed by a majority of the whole Committee and may be signed-electronically and signed in counterparts.

<Proposed amended resolution text showing exact changes being made:>

Sec. 3. Any document required to be signed by members of the Standing Committee or by the Clerical members thereof, or by any other body consisting of several members may be signed in counterparts each of which shall be deemed an original. *Testimonials required for ordination and required to be given by a Standing Committee under any of these Canons must be signed by a majority of the whole Committee and may be signed-electronically and signed in counterparts.*

And be it further.

Resolved, That the 81st General Convention amend Canon III.6.6.c .

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

III.6.6.c

c. On the receipt of such certificates, the Standing Committee, if a majority of all members consent, shall certify that the Canonical requirements for ordination to the Diaconate under this Canon have been met, that there is no sufficient objection on medical, psychological, moral, or spiritual grounds and that they recommend ordination. The Standing Committee shall evidence such certification, by a testimonial, addressed to the Bishop in the form specified below and signed by the consenting members of the Standing Committee in conformity with Canon I.12.3.

<Proposed amended resolution text showing exact changes being made:>

c. On the receipt of such certificates, the Standing Committee, if a majority of all members consent, shall certify that the Canonical requirements for ordination to the Diaconate under this Canon have been met, that there is no sufficient objection on medical, psychological, moral, or spiritual grounds and that they recommend ordination. The Standing Committee shall evidence such certification, by a testimonial, addressed to the Bishop in the form specified below and signed by the consenting members of the Standing Committee *in conformity with Canon I.12.3.*

And be it further.

Resolved, That the 81st General Convention amend Canon III.8.6.d.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

III.8.6.d

d. On the receipt of such certificates, the Standing Committee, a majority of all the members consenting, shall certify that the canonical requirements for ordination to the Diaconate under this Canon have been met and there is no sufficient objection on medical, psychological, moral, or spiritual grounds and that they recommend ordination, by a testimonial addressed to the Bishop in the form specified below and signed by the consenting members of the Standing Committee in conformity with Canon I.12.3.

<Proposed amended resolution text showing exact changes being made:>

d. On the receipt of such certificates, the Standing Committee, a majority of all the members consenting, shall certify that the canonical requirements for ordination to the Diaconate under this Canon have been met and there is no sufficient objection on medical, psychological, moral, or spiritual grounds and that they recommend ordination, by a testimonial addressed to the Bishop in the form specified below and signed by the consenting members of the Standing Committee *in conformity with Canon I.12.3.*

And be it further.

Resolved, That the 81st General Convention amend Canon III.8.7.c.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

III.8.7.c

c. On the receipt of such certificates, the Standing Committee, a majority of all the members consenting, shall certify that the canonical requirements for ordination to the Priesthood have been met and there is no sufficient objection on medical, psychological, moral, or spiritual grounds and that they recommend ordination, by a testimonial addressed to the Bishop in the form specified below and signed by the consenting members of the Standing Committee in conformity with Canon I.12.3.

<Proposed amended resolution text showing exact changes being made:>

c. On the receipt of such certificates, the Standing Committee, a majority of all the members consenting, shall certify that the canonical requirements for ordination to the Priesthood have been met and there is no sufficient objection on medical, psychological, moral, or spiritual grounds and that they recommend ordination, by a testimonial addressed to the Bishop in the form specified below and signed by the consenting members of the Standing Committee *in conformity with Canon I.12.3.*

And be it further.

Resolved, That the 81st General Convention amend Canon III.10.5.d.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

III.10.5.d

d. Upon receipt of the items set out in subsection .c of this Canon to the satisfaction of the Presiding Bishop, the Presiding Bishop, without delay, shall notify every Bishop of this Church exercising jurisdiction and every Standing Committee of this Church of the Presiding Bishop's receipt of those items, and request from each a statement of consent, or withholding of consent, to the reception of the Bishop into The Episcopal Church. Each Bishop with jurisdiction and each Standing Committee shall within 90 days of the sending of the notification respond to the Presiding Bishop or the Presiding Bishop's designee indicating their consent or their withholding of consent. The Standing Committee's Testimonial shall conform to Canon I.12.3.

<Proposed amended resolution text showing exact changes being made:>

d. Upon receipt of the items set out in subsection .c of this Canon to the satisfaction of the Presiding Bishop, the Presiding Bishop, without delay, shall notify every Bishop of this Church exercising jurisdiction and every Standing Committee of this Church of the Presiding Bishop's receipt of those items, and request from each a statement of consent, or withholding of consent, to the reception of the Bishop into The Episcopal Church. Each Bishop with jurisdiction and each Standing Committee shall within 90 days of the sending of the notification respond to the Presiding Bishop or the Presiding Bishop's designee indicating their consent or their withholding of consent. *The Standing Committee's Testimonial shall conform to Canon I.12.3.*

And be it further.

Resolved, That the 81st General Convention amend Canon III.11.3.b.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

III.11.3.b

b. Evidence of the consent of each Standing Committee shall be a testimonial in the following words, signed by a majority of all the members of the Committee, in conformity with Canon I.12.3:

<Proposed amended resolution text showing exact changes being made:>

b. Evidence of the consent of each Standing Committee shall be a testimonial in the following words, signed by a majority of all the members of the Committee, *in conformity with Canon I.12.3:*

And be it further.

Resolved, That the 81st General Convention amend Canon III.11.3.c by striking the following:

~~c. Testimonials required of the Standing Committee by this Title must be signed by a majority of the whole Committee, at a meeting duly convened, except that testimonials may be executed in counterparts, any of which may be delivered by facsimile or other electronic transmission, each of which shall be deemed an original.~~

EXPLANATION

Resolution 2022-A039 was referred to the Commission. The resolution would have amended Canon III.11.3.c to change the requirement for signatures required for Standing Committee testimonials to give consent to a Bishop's election, limiting the requirement to testimonials required by this canon, as opposed to "this Title," which would have also applied to testimonials to ordinations of deacons and priests. The Standing Commission decided instead to standardize the requirements for Standing Committee testimonials for ordinations, and to place that language into the Standing Committee Canon, I.12.3, rather than scattered in the ordination canons so that Standing Committee members can more easily find the rule. The language essentially moves the language about a majority signing Testimonials and signatures in the counterparts found in the current Canon III.11.3.c. into the canon governing Standing Committees. The Standing Commission also recommends placing cross-references to Canon I.12.3 in each of the ordination canons requiring testimonials.

A062 Amend Canon I.4.2.j Mutual Ministry Review

Resolved, That the 81st General Convention amend Canon I.4.2.j by amending the following.

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

j. The Officers of the Domestic and Foreign Missionary Society and the Officers of the Executive Council, and a committee of six members of Executive Council who are not officers, shall engage in a mutual ministry review to be completed not later than twelve months before the next scheduled General Convention. The mutual ministry review shall be facilitated by a consultant selected by the Chair and the Vice-Chair.

<Proposed amended resolution text showing exact changes being made:>

j. The Officers of the Domestic and Foreign Missionary Society and the Officers of the Executive Council, and a committee of six members of Executive Council who are not officers, shall engage in a mutual ministry review ~~every eighteen months~~, to be completed not later than twelve months before the next scheduled General Convention. The mutual ministry review shall be facilitated by a consultant selected by the Chair and the Vice-Chair.

EXPLANATION

Resolution 2022-A047 was referred to the Commission. The Commission recommended specifying the completion date for the mutual ministry review. By adding the deadline as “not later than twelve months before the next scheduled General Convention” it provides the specificity for the reviews that are not impacted by changes in dates to General Convention.

A063 Amend Canons I.2.2 : Term of Office of the Presiding Bishop

Resolved, That the 81st General Convention amend Canon I.2.2 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Sec. 2.

a. The term of office of the Presiding Bishop, when elected under the first paragraph of Article I, Section 3 of the Constitution, will begin on the 91st day after the adjournment of the Convention at which the Presiding Bishop is elected and will end on the 91st day after the adjournment of the third successive regular meeting of the General Convention. But if the Presiding Bishop attains the age of seventy-two years before completing that term, the Presiding Bishop must resign the office to the regular meeting of the General Convention which occurs nearest before the date of attaining such age, with the resignation taking effect when a successor assumes office. At that Convention a successor will be elected, and will assume office on the 91st day after the adjournment of that General Convention. If the regular meeting of the General Convention at which the Presiding Bishop’s successor is expected to be elected is postponed beyond the date originally set in accordance with Canon I.1.14.c, and if as a result of that postponement the Presiding Bishop attains the age of 72 years before a successor can be elected and assume office, then the Presiding Bishop may serve until the successor assumes office, regardless of having attained the age of 72 years, but no later than 90 days after the adjournment of the next meeting of the General Convention.

b. When the House of Bishops elects a Presiding Bishop under the second paragraph of Article I, Section 3 of the Constitution to fill a vacancy, the Presiding Bishop so elected will take office immediately.

<Proposed amended resolution text showing exact changes being made:>

a. The term of office of the Presiding Bishop, when elected ~~according to the provisions of~~ under the first paragraph of Article I, Section 3 of the Constitution, will begin on the 91st day after the adjournment shall be nine years, beginning the first day of the month of November following the close of the Convention at which the Presiding Bishop is elected and will end on the 91st day after the adjournment of the third successive regular meeting of the General Convention. But if the Presiding Bishop attains ~~unless attaining~~ the age of seventy-two years before completing that term, ~~the term shall have been completed; in that case the Presiding Bishop shall~~ must resign the office to the regular meeting of the General Convention which occurs nearest ~~to~~ before the date of attaining such age, with the resignation taking effect when a successor assumes office. At that Convention a successor ~~shall~~ will be elected, and ~~shall~~ will assume office on the first day of the month of November following the close of that 91st day after the adjournment of that General Convention ~~or immediately upon the death, retirement, or disability of the Presiding Bishop; except that when.~~ If the regular meeting of the General Convention at which the Presiding Bishop's successor is expected to be elected is postponed beyond the date originally set in accordance with Canon I.1.14.c, and if as a result of that postponement the Presiding Bishop attains the age of 72 years before a successor can be elected and assume office, then the Presiding Bishop may serve until the successor assumes office, regardless of having attained the age of 72 years, but no later than 90 days after the adjournment of the next meeting of the General Convention.

b. ~~When a Presiding Bishop has been elected by the House of Bishops~~ elects a Presiding Bishop ~~to fill a vacancy, as provided for in~~ under the second paragraph of Article I, Section 3 of the Constitution to fill a vacancy, the Presiding Bishop so elected ~~shall~~ will take office immediately.

EXPLANATION

The Standing Commission considered issues of electing a Presiding Bishop who may not be able to serve a nine-year term before reaching the mandatory retirement age and the added wrinkle of a delayed General Convention resulting in a Presiding Bishop reaching mandatory retirement age.

Ao64 Amend Canon I.1.6.d Capturing Clergy Records

Resolved, That the 81st General Convention amend Canon I.1.6.d to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

d. The Recorder shall prepare and present to each session of the General Convention a list of all Priests and Deacons ordained, received, transferred out, released and removed, returned, suspended, deposed, or restored; of all Bishops ordained, received, released and removed, returned, suspended, deposed, or restored; and of all Bishops, Priests, and Deacons who have died; such list to cover the period from the last preceding similar report of the Recorder through the thirty-first day of December immediately preceding each session of the General Convention.

<Proposed amended resolution text showing exact changes being made:>

d. The Recorder shall prepare and present to each session of the General Convention a list of all ~~Clergy~~ *Priests and Deacons* ordained, received, ~~suspended~~, *transferred out, released and removed, returned, suspended,* deposed, or restored; ~~and~~ of all Bishops ~~consecrated~~, *ordained, received, released and removed, returned, suspended, deposed, or restored;* and of all Bishops, Priests, and Deacons ~~and other Clergy~~ who have died; such list to cover the period from the last preceding similar report of the Recorder through the thirty-first day of December immediately preceding each session of the General Convention.

EXPLANATION

This proposal is addressing two issues: terminology and the capturing of all clergy on record in The Episcopal Church.

Terminology: This proposal changes all references of consecration of a bishop when used in place of or with ordination in the canons of the church to provide consistency with Canon III.11 and 1979 Book of Common Prayer, which address the ordination of bishops, in which the consecration is a part of the larger ordination service, not a service on its own. Further, a consecration cannot stand alone as a complete ordination.

Comprehensive reporting: Under the current system for reporting on clergy, there are cracks into which people fall if they are outside of a small handful of categories. This language expands the areas of status that must be kept on record and reported while also applying it to all three orders of ordination.

As TEC recognizes a diversity of gender expressions and understandings, the binary language of “men and women” is not inclusive and does not accurately reflect our understanding of gender.

A065 Amend Canon III.1.3

Resolved, That Canon III.1.3 be amended as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Sec. 3. The provisions of these Canons for the admission of Candidates for the ordination to the three Orders: Bishops, Priests and Deacons shall be equally applicable to all persons in the process.

<Proposed amended resolution text showing exact changes being made:>

Sec. 3. The provisions of these Canons for the admission of Candidates for the ordination to the three Orders: Bishops, Priests and Deacons shall be equally applicable ~~to men and women~~ *to all persons in the process.*

EXPLANATION

As TEC recognizes a diversity of gender expressions and understandings, the binary language of “men and women” is not inclusive and does not accurately reflect our understanding of gender.

A066 – Amend Canon V.1 to create a Custodian for the Constitution and Canons of the Episcopal Church

Resolved, That Canon V.1 is amended as follows

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon V.1

Sec. 5. There will be a Custodian of the Constitution and Canons of The Episcopal Church, nominated by the Presiding Officers of the two Houses of the General Convention and confirmed by the Executive Council. A vacancy in the office shall be filled in the same way. The Custodian will hold office for a term beginning twelve months after the adjournment of the previous regular meeting of the General

Convention and will remain in office until twelve months after the subsequent regular meeting of the General Convention, or until a successor is confirmed. The first Custodian of the Constitution and Canons of the Episcopal Church will be nominated by the Presiding Officers to be confirmed at the first Executive Council meeting following the adoption of this Canon. It will be the duty of the Custodian to certify that all digital and printed versions of the Constitution and Canons, including any amendment or amendments adopted at the most recent General Convention, conform to the Constitution and Canons as duly authorized by the General Convention.

Sec. 6 At the close of each regular meeting of the General Convention, the Custodian of the Constitution and Canons, in consultation with the chancellor to the Presiding Bishop, the chancellor to the President of the House of Deputies, and the Chair and Vice-Chair of the Standing Commission on Governance, Structure, Constitution, and Canons, will (a) certify the changes, if any, made in the Canons, including a correction of the references made in any Canon to another, and to report the same, with the proper arrangement thereof, to the Secretary of the General Convention; (b) certify in like manner the changes, if any, made in the Constitution, or proposed to be made therein under the provisions of Article XII of the Constitution, and to report the same to the Secretary of the General Convention, who shall publish them in the Journal, and (c) certify in like manner the changes, if any, made to the Joint Rules. The Custodian shall also have and exercise the power of renumbering of, and correction of references to, Articles, Sections and Clauses of the Constitution required by the adoption of amendments to the Constitution at a meeting of the General Convention in the same manner as provided with respect to the Canons and the Joint Rules.

Sec. 7 All Canons enacted by the General Convention, and all amendments and repeals of Canons, unless otherwise expressly ordered by act of the General Convention, shall take effect on the first day of January following the adjournment of the General Convention at which they were enacted or made.

And be it further

Resolved, that this change will take effect immediately upon adoption.

<Proposed amended resolution text showing exact changes being made:>

Sec. 5. *There will be a Custodian of the Constitution and Canons of The Episcopal Church, nominated by the Presiding Officers of the two Houses of the General Convention and confirmed by the Executive Council. A vacancy in the office shall be filled in the same way. The Custodian will hold office for a term beginning twelve months after the adjournment of the previous regular meeting of the General Convention and will remain in office until twelve months after the subsequent regular meeting of the General Convention, or until a successor is confirmed. The first Custodian of the Constitution and Canons of the Episcopal Church will be nominated by the Presiding Officers to be confirmed at the first Executive*

Council meeting following the adoption of this Canon. It will be the duty of the Custodian to certify that all digital and printed versions of the Constitution and Canons, including any amendment or amendments adopted at the most recent General Convention, conform to the Constitution and Canons as duly authorized by the General Convention.

Sec. 5. 6 ~~The Committee on Constitution and Canons of each House of the General Convention shall, at the close of each regular meeting of the General Convention, appoint two of its members~~ At the close of each regular meeting of the General Convention, the Custodian of the Constitution and Canons, in consultation with the chancellor to the Presiding Bishop, the chancellor to the President of the House of Deputies, and the Chair and Vice-Chair of the Standing Commission on Governance, Structure, Constitution, and Canons, will (a) ~~to~~ certify the changes, if any, made in the Canons, including a correction of the references made in any Canon to another, and to report the same, with the proper arrangement thereof, to the Secretary of the General Convention; ~~and~~ (b) ~~to~~ certify in like manner the changes, if any, made in the Constitution, or proposed to be made therein under the provisions of Article XII of the Constitution, and to report the same to the Secretary of the General Convention, who shall publish them in the Journal, and (c) *certify in like manner the changes, if any, made to the Joint Rules.* The ~~committee~~ Custodian shall also have and exercise the power of renumbering of, and correction of references to, Articles, Sections and Clauses of the Constitution required by the adoption of amendments to the Constitution at a meeting of the General Convention in the same manner as provided with respect to the Canons *and the Joint Rules.*

Sec. 6. 7. All Canons enacted ~~during the General Convention of 1943, and thereafter,~~ by the General Convention, and all amendments and repeals of Canons ~~then or thereafter made,~~ unless otherwise expressly ordered by *act of the General Convention,* shall take effect on the first day of January following the adjournment of the General Convention at which they were enacted or made.

EXPLANATION

Given changes in technology, the Constitution and Canons of The Episcopal Church are no longer published in only one form. Creating a Custodian would designate an individual to ensure that physical, PDF, and other publications are all accurate. Having a Custodian also designates one person to be responsible compiling changes made after each General Convention.

A051 Amend Canons I.2.4.a Data Collection for the Church (co-sponsored with House of Deputies Committee on the State of the Church)

Resolved, That the 81st General Convention amend Canon I.2.4.a to add item a.7 as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

7. Make provision for the analysis of appropriate data about this Church's mission, its opportunities, and challenges. An annual report, published freely to the Church, will include such data as to allow for data-informed decisions by the Domestic and Foreign Missionary Society, the General Convention, the Executive Council, dioceses, congregations, and local leaders.

<Proposed amended resolution text showing exact changes being made:>

7. Make provision for the analysis of appropriate data about this Church's mission, its opportunities, and challenges. An annual report, published freely to the Church, will include such data as to allow for data-informed decisions by the Domestic and Foreign Missionary Society, the General Convention, the Executive Council, dioceses, congregations, and local leaders.

And be it further

Resolved, That all dioceses, congregations, and other church institutions are urged to cooperate with all research endeavors sponsored by the Domestic and Foreign Missionary Society by responding to requests for data; and be it further

Resolved, That the General Convention will provide a budget allocation of \$75,000 to carry out this work in the first triennium.

EXPLANATION

This resolution was co-sponsored by the House of Deputies Committee on the State of the Church and the Standing Commission on Structure, Governance, Constitution and Canons.

When is the best time to plant a tree?

Twenty years ago.

When is the second-best time to plant a tree?

Now.

The Episcopal Church is woefully behind our sister denominations in the collection, study, and use of data for decision making at every level of the Church, and in a perfect world, this resolution would be designed to create a high level staff position for such work. Given the realities of a new Presiding Bishop who will want to organize their own staff, this stop-gap measure is presented to a) require the next Presiding Bishop to offer a full data analysis and b) urge the Church-wide structure, dioceses, congregations, committees, commissions, agencies, and boards to make use of data in their decision making. Outsourcing this work in the first triennium will allow the Presiding Bishop, the House of Deputies Committee on the State of the Church, and the Standing Commission on Structure, Governance, Constitutions, and Canons to take an iterative approach in understanding what data is helpful, how it is best collected, and in what form the report should be produced.

Supplementary Materials

Statement from the Standing Commission on October 10, 2023:

Statement from the Standing Commission on Structure, Governance, Constitution, and Canons: An invitation for input

The Standing Commission met in person at the Maritime Training Center in Linthicum Heights, Maryland, from 9 am, Monday, October 9, through noon, Wednesday, October 11.

As the Commission continues its work of review and revision of the Title IV disciplinary canons, we welcome additional input and legislative proposals via an online form by November 15, 2023 at <https://bit.ly/46K8Wzj>.

The Commission's work and discussions focused primarily on invitations from the Presiding Bishop and the President of the House of Deputies to address significant concerns across The Episcopal Church (TEC) about reported problems with disciplinary proceedings in which a Bishop is the respondent, as well as additional issues with clergy disciplinary proceedings.

The issues we face arise in part because of the language and structure of Title IV. They arise as well from the manner in which the church implements these canons, the tension between transparency to build trust and confidentiality to protect participants, and the culture of the wider church.

As a Standing Commission, our role is to recommend appropriate changes to our structures and procedures so that our disciplinary rules work well in practice to protect people from misconduct; resolve complaints fairly, promptly, and efficiently; and screen out meritless claims.

Our review of and action on specific suggested changes has been assisted by input received from many voices across the wider church. In view of the substance of these comments and the significance of the issues before us, we know that our work will require multiple meetings, given the rigorous review we accord to suggested canonical changes. Our work must assure that changes made are consistent with the rest of Title IV.

The issues now being considered as areas of revisions to the canons include but are not limited to:

- The role, qualifications, and accountability of Church Attorneys;
- The degree of discretion vested in various individuals and bodies involved in the pretrial resolution of misconduct complaints;

- Better ways of assuring church-wide consistency in the understanding and application of disciplinary processes. This may include, for example, improved training and/or the consolidation of disciplinary structures;
- The overwhelming number of people needed to make effective the disciplinary structures presently envisaged by the canons; and
- Similarities and differences between the disciplinary processes for bishops and other clergy, and steps toward consistent application of disciplinary standards across all orders of ordained ministry.

There is more work to be done to propose detailed canonical changes for consideration by the General Convention. The Commission is grateful for the many thoughtful comments and detailed suggestions it has received for changes to the Title IV disciplinary canons, in addition to many proposed amendments from last year's General Convention.

STANDING COMMISSION ON STRUCTURE, GOVERNANCE, CONSTITUTION & CANONS

Supplemental Report to General Convention

Navajoland:

This Subcommittee continued to work with the people of Navajoland through the fall and in January 2024. In September 2023 three members of the Subcommittee visited all three areas of Navajoland and in each explained the canonical differences between an Area Mission and a Missionary Diocese. The key difference for their needs is that a Missionary Diocese may elect its own Bishop. The Subcommittee learned that the Episcopal Church in Navajoland (ECN) is already operating very much like a Missionary Diocese. Conversations continued by Zoom. Important in their considerations and their concern on continued funding by The Episcopal Church were the words in the canons for both an Area Mission and a Missionary Diocese, "... shall constitute jurisdictions for which this Church as a whole assumes a special responsibility."

On January 4, 2024, the ECN Standing Committee met and resolved to hold an ECN Special Convocation to consider filing a petition with General Convention to become a Missionary Diocese. The Special Convocation met on January 20, 2024, and resolved to file the petition to become a Missionary Diocese.

The Subcommittee and the Standing Commission as a whole fully support this petition that will allow ECN to further their own spiritual growth in a way consonant with their own culture which has long been ignored by those outside Navajoland.

Resolutions Amending Title IV

A139 Amend Canon IV.6.4 -Intake Timeline

Resolved, That the 81st General Convention amend Canon IV.6.4 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Sec. 4. Upon receipt of such information, the Intake Officer may undertake such initial inquiry as he or she deems necessary, and shall incorporate the information into a written intake report, including as much specificity as possible. Within 45 days after receiving information concerning an Offense, the Intake Officer must provide copies of the intake report to the other members of the Reference Panel and to the Church Attorney.

<Proposed amended resolution text showing exact changes being made:>

Sec. 4. Upon receipt of such information, the Intake Officer may undertake such initial inquiry as he or she deems necessary, and shall incorporate the information into a written intake report, including as much specificity as possible. *Within 45 days after receiving information concerning an Offense, the* ~~The~~ Intake Officer ~~shall~~ must provide copies of the intake report to the other members of the Reference Panel and to the Church Attorney.

EXPLANATION

It takes a lot of bravery for an Injured Person or Complainant to make a report against a member of the clergy. The silence that follows that report can be deafening. Currently, there is no time limit on the initial intake, which means that silence can last indefinitely and cause undue hardship on the brave soul that made the complaint. This amendment requires a) that initial intake be completed within 45 days.

A140 Amend Canon IV.6.8 - Reference Panel

Resolved, That the 81st General Convention amend Canon IV.6.8 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Sec. 8. The Reference Panel must meet with 30 days after receiving the intake report to determine how to refer the report. Referral options are (a) no action required other than appropriate pastoral response pursuant to Canon IV.8; (b) Conciliation pursuant to Canon IV.10; (c) investigation pursuant to Canon IV.11; (d) to the Conference Panel pursuant to Canon IV.12; or (e) referral for possible agreement with the Bishop Diocesan regarding terms of discipline pursuant to Canon IV.9. Referral decisions shall require the approval of a majority of the Reference Panel. The Reference Panel shall establish a schedule for each approved option and the President of the Disciplinary Board shall be responsible for monitoring each such schedule.

<Proposed amended resolution text showing exact changes being made:>

Sec. 8. The Reference Panel ~~shall meet as soon as possible~~ must meet within 30 days after receiving the intake report to determine how to refer the report. Referral options are (a) no action required other than appropriate pastoral response pursuant to Canon IV.8; (b) Conciliation pursuant to Canon IV.10; (c) investigation pursuant to Canon IV.11; (d) to the Conference Panel pursuant to Canon IV.12; or (e) referral for possible agreement with the Bishop Diocesan regarding terms of discipline pursuant to Canon IV.9. Referral decisions shall require the approval of a majority of the Reference Panel. The Reference Panel shall establish a schedule for each approved option and the President of the Disciplinary Board shall be responsible for monitoring each such schedule.

EXPLANATION

“As soon as possible” can mean different things to different people.

A141 Amend Canon IV.6.9 - Monthly Reports

Resolved, That the 81st General Convention amend Canon IV.6.9 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Sec. 9. The Reference Panel must monitor the progress of each referral on a monthly basis to ensure that the matter is progressing in a timely fashion. Until such time as the matter is referred to a Hearing Panel, if the Reference Panel determines that the matter has reached an impasse or is not progressing in a timely fashion, it may re-refer the matter. Once a matter is referred to a Hearing Panel, Canon IV.15.1 will govern any issue regarding the progress of the matter. The Intake Officer shall report at least monthly to the Respondent, the Respondent’s Advisor, the Respondent’s Counsel, if any, the Complainant, the Complainant’s Advisor and the Complainant’s Counsel, if any, on the progress in the matter. Should the Intake Officer not report at least monthly, the Respondent or the Complainant may petition the President of the Disciplinary Board who shall provide a report not later than 15 days from the date of the petition.

<Proposed amended resolution text showing exact changes being made:>

Sec. 9. The Reference Panel ~~shall~~ must monitor the progress of each referral on a monthly basis to ensure that the matter is progressing in a timely fashion. Until such time as the matter is referred to a Hearing Panel, if the Reference Panel determines that the matter has reached an impasse or is not progressing in a timely fashion, it may re-refer the matter. Once a matter is referred to a Hearing Panel, Canon IV.15.1 ~~shall~~ will govern any issue regarding the progress of the matter. The Intake Officer shall report at least monthly to the Respondent, the Respondent’s Advisor, the Respondent’s Counsel, if any, the Complainant, the Complainant’s Advisor and the Complainant’s Counsel, if any, on the progress in the matter. *Should the Intake Officer not report at least monthly, the Respondent or the Complainant may petition the President of the Disciplinary Board who must provide a report not later than 15 days from the date of the petition.*

EXPLANATION

A hallmark of the Title IV process is an appropriate pastoral response for all involved, and the key to good pastoral care is clear communication. When communication breaks down, it is often the case that both the Complainant and the Respondent feel isolated and become fearful to follow up. This amendment makes clear the remedy both parties have should communication breakdown. The appeal is lodged with the President of the Disciplinary Board to allow for cases in which the Bishop is the Complainant.

A142 Amend Canon IV.6.7 – copy of notice

Resolved, That the 81st General Convention amend Canon IV.6.7 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Sec. 7. If the Intake Officer determines that the information, if true, would constitute an Offense, the Intake Officer shall promptly forward the intake report to the Reference Panel. The president shall promptly select from the Disciplinary Board, a Conference Panel and a Hearing Panel, and shall designate a president of each Panel. At the same time as forwarding the intake report to the Reference Panel, the Intake Officer shall send a notice to the subject Member of the Clergy informing him or her of the nature of the alleged Offense(s), the identity of any persons who have been designated as Complainants, and describing the next procedural steps that the Member of the Clergy can anticipate. The notice shall also remind the Member of the Clergy of his or her duty under Canon IV.3.1.b to cooperate in the subsequent proceedings. The Intake Officer shall at the same time provide a copy of the notice to the Complainant and to any other person from whom the Intake Officer has received information concerning the alleged Offence.

<Proposed amended resolution text showing exact changes being made:>

Sec. 7. If the Intake Officer determines that the information, if true, would constitute an Offense, the Intake Officer shall promptly forward the intake report to the Reference Panel. The president shall promptly select from the Disciplinary Board, a Conference Panel and a Hearing Panel, and shall designate a president of each Panel. At the same time as forwarding the intake report to the Reference Panel, the Intake Officer shall send a notice to the subject Member of the Clergy informing him or her of the nature of the alleged Offense(s), the identity of any persons who have been designated as Complainants, and describing the next procedural steps that the Member of the Clergy can anticipate. The notice shall also remind the Member of the Clergy of his or her duty under Canon IV.3.1.b to cooperate in the subsequent proceedings. *The Intake Officer shall at the same time provide a copy of the notice to the Complainant and to any other person from whom the Intake Officer has received information concerning the alleged Offence.*

EXPLANATION

It takes a lot of bravery for an Injured person or Complainant to make a report against a member of the clergy. The silence that follows that report can be deafening. This amendment requires that the Complainant or others who have provided information to the Intake Officer be informed of the Intake Officer's decision to send a matter to the Reference Panel at the same time that the Subject Member of the Clergy is informed.

A143 Amend IV.17.3.b and IV.17.5 - Disciplinary Board for Bishops

Resolved, That the 81st General Convention amend Canon IV.17.3.b to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

b. The Disciplinary Board for Bishops consists of six Bishops elected by the House of Bishops at a regular meeting of the General Convention, six other Clergy (including at least one Deacon), and six Lay Persons elected by the House of Deputies at a regular meeting of the General Convention. All Lay Persons elected or appointed to serve must be confirmed adult communicants in good standing.

<Proposed amended resolution text showing exact changes being made:>

b. The Disciplinary Board for Bishops consists of ~~ten~~ six Bishops elected by the House of Bishops at a regular meeting of the General Convention, ~~and four Priests or Deacons~~ six other Clergy (including at least one Deacon), and ~~four~~ six Lay Persons elected by the House of Deputies at a regular meeting of the General Convention. All Lay Persons elected or appointed to serve must be confirmed adult communicants in good standing.

And be it further

Resolved, That the 81st General Convention amend Canon IV.17.5 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

The Conference Panel shall consist of two Bishops, two other clergy and two lay persons. The Hearing Panel shall consist of two Bishops, two Priests or Deacons and two lay persons, except that the Hearing Panel for the Offense specified in Canon IV.14.1.h.2 pertaining to Doctrine Offenses shall consist of five Bishops only.

<Proposed amended resolution text showing exact changes being made:>

The Conference Panel shall consist of ~~three~~ two Bishops, ~~one Priest or Deacon~~ two other clergy and ~~one lay person~~ two lay persons. The Hearing Panel shall consist of ~~three~~ two Bishops, ~~one Priest or Deacon~~ two Priests or Deacons and ~~one lay person~~ two lay persons, except that the Hearing Panel for the Offense specified in Canon IV.14.1.h.2 pertaining to Doctrine Offenses shall consist of five Bishops only.

STANDING COMMISSION ON WORLD MISSION

Members

Ms. Martha Gardner, Chair	Massachusetts, I	2024
The Rev. Manoj Mathew Zacharia, Ph.D., Vice-Chair	Maryland, III	2027
The Rev. Irene Tanabe, Secretary	Olympia, VIII	2024
The Rt. Rev. Lucinda Ashby	El Camino Real, VIII	2027
The Rev. Canon Walter B.A. Brownridge	Vermont, I	2024
The Very Rev. Dr. Caroline Carson	New Jersey, II	2027
Sra. Grecia Christian Reynoso	Dominican Republic, IX	2024
Canon Judith Conley	Arizona, VIII	2024
Mr. Thomas Diaz	Los Angeles, VIII	2027
Ms. Emily Elston	Southern Virginia, III	2027
The Rt. Rev. Alan Gates	Massachusetts, I	2024
Ms. Felicity Hallanan	Central New York, II	2027
Ms. Emily Keniston	Maine, I	2024
The Rev. Grey Maggiano	Maryland, III	2024
The Rt. Rev. José McLoughlin	Western North Carolina, IV	2024
Ms. Denise Reovan	the Virgin Islands, II	2024
Ms. Angela Smith	Western Kansas, VII	2024
Ms. Diane Wright	Virginia, III	2027
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024
The Rev. Canon Dr. Wilmot Merchant, Liaison of Executive Council	South Carolina, IV	2024

Changes in Membership

The Rt. Rev. Rafael Morales , the Rt. Rev. Prince Singh and Mr. Jack Tull resigned during the biennium.

Representation at General Convention

Bishop Lucinda Ashby, Alternate Deputy Walter Brownridge, Deputy Judith Conley, Deputy Thomas Diaz, Bishop Alan Gates, Alternate Deputy Felicity Hallanan, Bishop José McLoughlin.

Acknowledgements

Knowing that no work is ever done alone, the Standing Commission on World Mission wishes to acknowledge, celebrate and thank those offices and individuals who have worked and walked with us during the last biennium to ensure the work we undertook was relevant, comprehensive and supported. We are grateful to all our partners, most especially the Presiding Bishop's staff officers in the Office of Global Partnerships and the Office of Government Relations, both of which provided essential context and information as we discerned those global issues which require our attention most urgently. We are also grateful to the members and leadership of the Global Episcopal Mission Network for their accompaniment. Finally, we could not do our work without the expertise and support of our interpreters and translators.

Mandate

2022 - Canon I.1.2.n.3

3. A Standing Commission on World Mission. It shall be the duty of the Commission to:
 - i. Identify the global mission work carried out by the Domestic and Foreign Missionary Society, dioceses, congregations and mission organizations throughout the church.
 - ii. Consult with the above bodies to envision future directions for The Church's global engagement.
 - iii. Develop policy proposals for world mission for consideration by General Convention.
 - iv. Discharge such other duties as shall from time to time be assigned by the General Convention.

Summary of Work

Lord Jesus Christ, you stretched out your arms of love on the hardwood of the cross, that everyone might come within the reach of your saving embrace: So clothe us in your Spirit that we, reaching forth our hands in love, may bring those who do not know you to the knowledge and love of you; for the honor of your Name.

Amen.

Purpose

Why is the Standing Commission on World Mission important to the Domestic and Foreign Mission Society? Electronic communications, extensive travel opportunities, political unrest resulting in increasing migration movements, radical changes in climate –all these serve to awaken and heighten concerns of those who seek to live and share their faith. The role of the Standing Commission on World Mission is to envision future directions for The Episcopal Church in connection with global engagement and develop policies for consideration by General Convention (see Mandate above). This Commission's work is founded on the Church's understanding of our faith and relationship with God and our neighbors across the globe.

The mission of the Church is to *restore all people to unity with God and each other in Christ* (BCP pg. 855). We pursue this mission as we pray, worship, proclaim the Gospel and promote justice, peace, and love. Effecting this mission necessitates that we be in humble relationship, striving to uphold the dignity of all human beings, and being centered on the values of the peaceable Kingdom of Christ. In a climate where the voices of isolationism and intolerance are weaving their threads into the very fabric of institutions, the Standing Commission on World Mission has sought to bring to the fore a new garment, donning our Baptismal Covenant whereby we present a counterculture based on the values of relationality, epistemic humility, and a celebration of diversity. Upholding these values is our way of reaching forth our hands in love and living out the Great Commission (Matthew 28:20).

The charism of relationality is enshrined in the preamble of The Episcopal Church's Constitution and Canons. As The Episcopal Church, we are a constituent member of the Anglican Communion. Thus, we are, at our best, a relational body. To be in relationship does not necessitate complete agreement on all issues. Rather, the voice of The Episcopal Church is vital in upholding and advocating for the values of God's liberating love throughout the world. As constituent members of the Anglican Communion, it is imperative that we –individuals, dioceses, and the Church– engage in relationship-building to counter burgeoning isolationism, and the tendency to prioritize self-interest over the common good. Thus, we invite a posture of listening, with humility, to voices from throughout the world that continue to help us discern and clarify where God is calling us.

Activities

To root ourselves in the missional work of the Church --to restore all people to the unity of God and each other-- we must live into deeper relationship with our Anglican siblings around the globe and, more broadly, with all of God's people. To do so, we must first acknowledge that many of those relationships are broken or perhaps never existed in the first place. The work of undoing the colonial mindset that exists in The Episcopal Church is first and foremost about improving those relationships.

Continuing the work from the last triennium, the Standing Commission on World Mission has explored the many ways the colonial mindset continues to dominate conversations around mission in the Church and how the Church is already, and can improve upon, deconstructing that mindset. During this biennium, the Standing Commission on World Mission has striven to move closer to these ideals by: confronting rising religious nationalism at home and abroad, researching and denouncing the continuing trauma of gender-based violence, identifying and confronting the colonial structures and behaviors still prevalent in our institutions, lifting the work of our communion partners, supporting youth in ways of expressing their faith in global contexts, collaborating with other interim bodies to provide a global perspectives and creating a network of Global Mission Advocates inside The Episcopal Church to serve as guides for congregations and communities seeking to engage deeper in mission.

As a body, we encourage the larger church to follow similar patterns and steps. Churches, communities and institutions of all sizes can engage with decolonization, utilize the global mission toolkit, pray for peace, justice and clarity around the world, and participate as they are able in mission to the Church and the wider world next door or around the globe. We commend everyone to engage more deeply with the Office of Global Partnerships, to contemplate just how big and broad the Anglican Communion is, and to consider what it means to be a part of a global network of believers who disagree on so many things, and yet as a body hold fast to one truth --the never-failing love of Christ Jesus.

Committee Structure

Through conversation, study, collaboration and practice during this biennium, the Standing Commission on World Mission identified four key areas for committee work. The working groups were: Dismantling Colonialism, Rising Religious Nationalism, the Global Mission Advocates Network and Gender-Based Violence. In addition, work was conducted in the following areas: supporting Anglican Communion connections, encouraging the newly-formed Episcopal Veterans Network; exploring connections with formation partnerships; strengthening and uplifting our collaboration with global mission partnerships; supporting the ongoing work of the Covenant and Bilateral Committees; supporting the work of the Task Force on Translation and Interpretation (which the Standing Commission on World Mission called for during the last triennium); collaborating with the Task Force on Care of Creation and Environmental Racism especially to explore common mission in biodiversity,

the Fossil Fuel Treaty, and the Anglican Communion Forest, and partnering with the Standing Commission for Ecumenical and Interreligious Relations on several common concerns.

Dismantling Colonialism Working Group Report

Purpose

The 80th General Convention adopted Resolution A017 (Assessment of Past Colonialism in the Church's World Mission Ministries) which tasked the Standing Commission on World Mission with preparing a report on the impact of colonialism on The Episcopal Church. The Dismantling Colonialism Working Group on behalf of the Standing Commission on World Mission, researched and prepared a report, the text of which can be found in the Supplementary Materials.

Activities

In order to prepare the report requested by General Convention, the Dismantling Colonialism Working Group researched various institutions and investigated different models adopted by other colonized and colonizing entities. This research included delving into archives, hearing from academic and mission professionals engaged in the historical analysis of the ramifications of colonialism, and engaging subject area material. Below are highlights from the preamble of the report which include the establishment of a working definition of the term “colonial mindset” as well as recommendations on next steps which are included in a proposed resolution calling for the creation of task force to continue this critical work.

The need for the requested report was clear from the outset, yet what has emerged as a primary focus is the continuing impact of the colonial mindset on the Church today. That is where the Commission's concern lies now, identifying how The Episcopal Church and its partners, supporters and collaborators continue to propagate a colonial mindset in their ministry, work, and community endeavors. The colonial mindset can be described as the living legacy of colonialism in the 21st century exemplified by the supremacy of Western/European mindsets, modes of thinking, cultural and economic systems, and bodies in former colonial states and their partners.

The Standing Commission on World Mission believes that The Episcopal Church must reckon with its dual identity as a former colony and a colonizing power as the Church has served both as the official governmental representation in the U.S. colonies and the official colonizing religion around the world. As such, Episcopal and Anglican missional institutions are replete with organizations, actors and systems that offer a preference for white, European and male voices in the allocation of funds, people and attention.

Acknowledgment begins with recognizing the intention of creation as evinced by Genesis and the reality of the human saga recognizing that the intention of the created order and human relationships

has not been realized. To the contrary, humanity's alienation from God, the created order, and each other has resulted in power dynamics that have manifested in the exertion of power by empires over colonized subjects. To acknowledge the reality of such power dynamics and the resultant lack of conciliarity between empire and the colonized subject is the first step in reconciliation. The Anglican Church, The Episcopal Church, and its missional organs have often been the voice of empire and may still function that way through lack of awareness.

An examination of this reality begins by looking both at the history and present-day Church. [The Episcopal Diocese of Liberia](#) was established to ensure that the freed blacks sent back to Africa by white Americans, hoping to export their discomfort and new social challenges, would abide by correct norms and values (as established by those white Americans). Episcopal schools and missions in Native American communities were established with the expressed purpose of "civilizing" the native population to be "like us". Our Province IX dioceses are both our largest and our poorest, and are often dependent on the generosity of foreign donors or on "Friends of.." campaigns, which are financial resources given to the diocese and are controlled by U.S.-led boards and organizations. Even our current reality in The Episcopal Church is colonial: despite being the fastest growing economic power in the U.S., Spanish-speaking churches in The Episcopal Church are almost always mission parishes of more moneyed congregations and institutions - even when they rapidly outpace their sponsors in membership and ministry programs. ¹

Healing is possible, but it requires further acknowledgement, truth-telling, reconciliation, and repair. Holy Scripture tells us that part of the struggle is illuminated in Paul's letter to the Ephesians: "For our struggle is not against enemies of blood and flesh, but against the rulers, against the authorities, against the cosmic powers of this present darkness, against the spiritual forces of evil in the heavenly places (6:12)." The challenge of dismantling the colonial mindset requires that parties be vulnerable as they finally grapple with this tragic and painful history. The reality of the American dilemma is that reconciliation is so difficult because the sins of colonialism and racism have been imprinted on the American psyche from the beginning.

There are ample models of reconciliation and hope to build from, from Australia to South Africa to Rwanda, even to the ongoing reparations work (which must be redoubled) in our own Church today.

¹ <https://history.state.gov/milestones/1830-1860/liberia#:~:text=In%201816%2C%20a%20group%20of,the%20world%20at%20that%20time.>

² Alexander Crummell and His African "Race-Work": An Assessment of His Contributions in Liberia to Africa's "Redemption," 1853-1873. Author: M. B. Akpan
Source: Historical Magazine of the Protestant Episcopal Church, JUNE, 1976, Vol. 45, No. 2 (JUNE, 1976), pp. 177-199
Published by: Historical Society of the Episcopal Church

However, the Church must first acknowledge that it will not be easy, that it be costly, and that as Christians, we must come humbly before God, and those we have harmed, as we hope for mercy.

Rising Religious Nationalism Working Group

Purpose

Given the mission of The Episcopal Church, as stated in the Book of Common Prayer’s catechism, is “to restore all people to unity with God and each other in Christ,” p. 854) The Episcopal Church must recognize that violence in all forms is an affront to this mission. While violence manifests itself in many ways, increasing reification of religious identity that is affected by religious extremism is particularly alarming. When entrenched in, and through, the instruments of the nation-state, such religious extremism becomes religious nationalism. Thus, this ideology is the intersection of religious identity and nationalist ideologies within a specific country or nation. It often involves the belief that the government or state derives its legitimacy and authority from a particular religious tradition or set of spiritual values. Therefore, discussions around religious nationalism within The Episcopal Church may explore how religious identity can be reconciled with principles of inclusivity and respect for all people, regardless of religious or national backgrounds.

Religious extremism is at a crisis point. Rising religious nationalism includes both the “Christian nationalist” movement in the United States and global forms of religious extremism. Rabid fundamentalism acts as an accelerant and fuels conflict situations, thereby catalyzing extremist actions. Religious nationalism is antithetical to global Christian mission and ecumenical and interreligious engagement; as such it must be a priority of global mission in The Episcopal Church to educate and act against the threat and impact of rising religious nationalism. Such study informs and shapes how we live out our Baptismal Covenant in respecting the dignity of every human being, fostering healthy worldwide ecumenical and interfaith relationships and dialogues, and providing safe spaces / safety nets (emotional, psychological, and even physical).

As followers of Jesus, who is the incarnation of a loving, liberating, and life-giving God, Episcopalians are called to the mission to tell, teach, tend, transform, and treasure all by articulating a theology rooted in epistemic humility by crossing boundaries, listening deeply, and living like Christ (see the SCWM’s [Guiding Principles](#) “Becoming a World Where Love is the Way”). Such a theological posture denounces the idolatry of fundamentalism and religious extremism in advancing justice rooted in inclusivity.

Activities

The Religious Nationalism Working Group focused its efforts on reading and research. Commended resources for further study on this topic are found in the Supplemental Materials.

In response to the urgency of the rising of religious nationalism, the Standing Commission on World Mission additionally presents a resolution for adoption by the 81st General Convention in which The

Episcopal Church identifies incidents of rising religious nationalism and acknowledges the urgent need to stop its spread. Incidents may include turmoil or volatility in a social context, life-threatening behaviors against a people or religion, a historically based continuation of systemic hate crimes, and the targeting of minority groups. In addition, the resolution urges The Episcopal Church to combat rising religious nationalism in partnership with inter-religious, ecumenical, and Anglican Communion partners.

Global Mission Advocates Network Working Group

Purpose

The purpose of establishing Global Mission Advocates is to ensure that The Episcopal Church remain committed to the spreading of the Gospel and the furtherance of Christ's mission of love and compassion in the world in a sustainable and responsible manner (Resolution A016, 80th General Convention). [Resolution A016](#) passed at the 80th General Convention encourages each diocese, jurisdiction, Episcopal seminary, and diocesan school of ministry to appoint at least one person to serve as a Global Mission Advocate to promote the study and use of the [Guiding Principles for World Mission](#) as adopted at General Convention. Advocates are encouraged to share with the Church promising global mission practices developed as these guiding principles are implemented alongside other models of ministry such as Asset-Based Community Development and the Sustainable Development Goals. In addition, the resolution calls for the creation of a Global Mission Advocates Network (GMAN) to share experiences with the implementation, study, and promotion of the Guiding Principles. This Network will provide guidance to the Standing Commission on World Mission on the practical application of the Guiding Principles and suggested amendments.

Activities

In furtherance of the implementation of Resolution A016, the GMAN Working Group began the development of the Global Mission Advocates Network by sending email requests to diocesan bishops to appoint a diocesan Global Mission Advocate. As of November 2023, about 50 dioceses have made such appointments. Together with the Office of Global Partnerships (OGP), the GMAN Working Group organized and led meetings on Zoom of the GMAN (which began as quarterly gatherings but moved to monthly) which include updates from the OGP, deeper exploration into the Guiding Principles curriculum, opportunity for fellowship and learning from each other on experiences in promoting global mission within dioceses. In addition, the GMAN Working Group, together with OGP, planned the first triennial in person GMAN gathering taking place April 3-6, 2024 at Camp Allen, Texas. In support of continuing triennial gatherings of the network, the GMAN Working Group has proposed a resolution for providing funding to OGP to defray costs for advocates to attend the next in-person meeting.

Gender-Based Violence Working Group Report

Purpose

The Standing Commission on World Mission (SCWM) recognizes the urgency of the worldwide epidemic of violence against women and girls/gender-based violence (VAWG/GBV) that impacts not only the women and girls who are direct victims of gendered violence, but infects and destroys the fabric of entire families, communities, and societies. The onset of the COVID-19 pandemic placed women and girls at even higher risk of victimization, the rates of which have surged during subsequent years as countermeasures continue to lag. The ongoing, devastating harm of this brand of violence in its multitude of forms is perpetuated by silence and accompanied by shame and stigma.

Certainly, the concerns relating to gender-based violence are far wider and deeper than women and girls alone. During this biennium, in concert and consultation with several Episcopal Church entities and some global partners, the Gender-Based Violence Working Group focused its efforts in support of church-wide response to the plight of women and girls. Standing in unity with women and girls, the Working Group encourages the use and further development of formation and educational, liturgical, prayer and advocacy resources to end gender-based violence, affirming that awareness is the beginning of change.

SCWM is committed to ongoing efforts to end this plague of violence and the historic silence surrounding the collective lack of resolve to end the injustice, within The Episcopal Church and in the world. SCWM's continuing work seeks to demonstrate appropriate support for those affected, inspire collective action, create, enact, and enforce policy that counters complicity while actively endeavoring to advance the eradication of VAWG/GBV in the world.

Activities

In April of 2023, SCWM created a working group on violence against women and girls/gender-based violence which has undertaken a research process with various organizations, groups, and offices within The Episcopal Church and the Anglican Communion engaging in the work of mission on issues of VAWG/GBV.

To date this work, while heteronormative, provides deeper understanding of the occurrence of violence against women and girls, the forms, and impact of bias within the Church and globally, and has equipped the Gender-Based Violence Working Group to make recommendations for further study at the individual, parish and diocesan levels. While the Working Group will continue its research in the next triennium, it now offers a resolution to encourage the use of [God's Justice: Theology and Gender Justice](#), a resource on healthy gender roles created and shared by the [Anglican Communion Office of Gender Justice](#), and the observance of [16 Days of Activism](#), an effort promoted by the [UN Women](#), using [Episcopal Relief and Development's 16 Days of Activism Toolkit](#). Both resources offer practical

and accessible ways for Episcopalians to learn about gender inequality and to begin advocacy to eradicate violence and injustice based on gender.

This work will continue into the next triennium and will seek to respond to the clear need for General Convention awareness and resolutions to specifically address male-female gender inequalities in society beyond a few basic resolutions such as equal pay for equal work. Even with the focus on an expanded definition of gender across binaries, male/female gender inequalities will persist if they are not addressed. The Episcopal Church has policy on gender-based violence and human trafficking but still lacks information and policy on the underlying root causes of gender discrimination and inequality that must be documented and addressed to fully reckon with gender justice and inequality worldwide. Episcopal delegates at the [United Nations Commission on the Status of Women](#) comment on these persisting issues of inequity nearly annually, and it is time that the General Convention address these issues directly.

Additional Reports

Anglican Communion Connections

As stated in the preamble to the Constitution of The Episcopal Church: “The Protestant Episcopal Church in the United States of America, otherwise known as The Episcopal Church (which name is hereby recognized as also designating the Church), is a constituent member of the Anglican Communion, a Fellowship within the One, Holy, Catholic, and Apostolic Church, of those duly constituted Dioceses, Provinces, and regional Churches in communion with the See of Canterbury, upholding and propagating the historic Faith and Order as set forth in the Book of Common Prayer.”

The [Anglican Communion](#) is a family of forty-two autonomous and independent-yet-interdependent national, pan-national and regional churches in communion with the See of Canterbury. There is no central authority in the Anglican Communion; all of the provinces are autonomous and free to make their own decisions in their own ways – guided by recommendations from the four Instruments: the Archbishop of Canterbury, the Lambeth Conference, the Primates’ Meeting and the Anglican Consultative Council.

The Standing Commission on World Mission strongly affirms and supports the work of the Episcopal Church with regard to the Anglican Communion and seeks to encourage and strengthen partnerships and relationships across the Communion.

[The Anglican Consultative Council](#). In February 2022, the [Anglican Consultative Council \(ACC-18\)](#) met in Accra, Ghana. The Episcopal Church was represented by Bishop Eugene Sutton, the Rev. Canon Ranjit Mathews, and Canon Annette Buchanan. Several resolutions and statements of support passed by ACC-18 relate directly to the SCWM work and as such are commended for use in The Episcopal Church.

- For colonialism: 4(f) Response to Cape Coast Castle, and 4(m) The Effect of Colonization on Indigenous Peoples.
- For gender-based violence: 4(h) Women’s Global Voice for Unity and Justice, and 4(i) Restoring Unity Through Gender Justice.
- For work within the Anglican Communion: 2(a) Theological Education, 3(a) Good Differentiation, 3(b) International Anglican Family Network, 3(c) Anglican Health and Community Network, 3(d) Legal Advisors Network, 3(f) Anglican Communion Calendar, and 3(i) Inter-Anglican Standing Commission on Unity, Faith and Order (IASCUFO).
- For collaborative work with the Task Force on Creation Care and Environmental Racism: 5(b) Moratorium on New Fossil Fuel Developments 5(c), The Communion Forest, and 5(e) Responding to the Loss and Damage Caused by Climate Change.
- For work with the United Nations: 5(a) Sustainable Development Goals.
- For work with Youth, Formation and Global Mission: 5(f) Youth Engagement in the Life of the Church.

[The Lambeth Conference](#). The theme of the Lambeth Conference meeting in the summer of 2022 was to explore what it means to be ‘God’s Church for God’s World’. The Lambeth Conference journey continues in Phase 3 as the Lambeth Calls and outcomes of the conference are brought into the life of the Anglican Communion.

The aim of each call is to deepen faithfulness to God, advance the ministry of the communion and enable wider participation in the calls by churches and communities around the world. Each call had a drafting group, with diverse representation from around the Anglican Communion. Each call includes declarations, affirmations, and common calls for action or reflection. Lambeth Calls were shared on the following themes: Discipleship, Environment and Sustainable Development, Anglican Identity, Safe Church, Science and Faith, Human Dignity, Christian Unity, Mission and Evangelism, Interfaith, and Reconciliation.

For each “Call,” webinars, group discussions, Bible studies and a wide range of resources are being offered. The SCWM encourages congregations and dioceses to take the Calls forward in your setting.

[The Five Marks of Mission](#). The Five Marks of Mission are an important statement on mission. They express the Anglican Communion’s common commitment to, and understanding of, God’s holistic and integral mission.

1. To proclaim the Good News of the Kingdom
2. To teach, baptize and nurture new believers
3. To respond to human need by loving service

4. To transform unjust structures of society, to challenge violence of every kind and pursue peace and reconciliation
5. To strive to safeguard the integrity of creation, and sustain and renew the life of the earth

[The Anglican Alliance](#) is a platform for those across the Anglican Communion who work for a world free of poverty and injustice, to be a voice for the voiceless, to reconcile those in conflict, and to safeguard the earth. It is an excellent example of how co-operative working and sharing across the Anglican/Episcopal world can amplify impact and positive change.

As a means of strengthening the bonds within the Anglican Communion, the Standing Commission on World Mission proposes a resolution asking the 81st General Convention of the Episcopal Church to

Affirm our membership in and relationship with others in the Anglican Communion

- Give thanks for, and encourage participation in, the many networks existing in the Anglican Communion in the areas of youth, family, indigenous, peace and justice, women, environment, health and community, safe church, interfaith concerns, church planting and colleges and universities - many which were lifted up at the 18th Anglican Consultative Council held in early 2023
- affirm the need to continue to work across theological, cultural and social differences, and encourage that all Episcopal leaders take time to consider the proposal from the [Inter-Anglican Standing Commission on Faith, Unity and Order \(IASCFUO\)](#)
- Encourage the use of the Anglican Cycle of Prayer across churches and dioceses within The Episcopal Church

Just War and Pacifism Ongoing Work Report

Building on the achievements of The Episcopal Church's [Military Chaplains' Just War Education Project](#) in the last triennium, and enabled by a Constable Grant and completed in 2022, the Standing Commission on World Mission seeks to affirm and encourage the ongoing work of just war and pacifism. The project developed and disseminated educational resources on the just war and pacifism traditions for the Church's military chaplains to apply in their ministry to service members and veterans, especially those suffering from moral injury because of their combat duty. The project's online resources, including video interviews with leading experts and veteran military chaplains, are available on the website of the [Suffragan Bishop for Armed Forces and Federal Ministries](#).

[Resolution A033](#) adopted by the 74th General Convention Resolved “That the 74th General Convention call upon all members of The Episcopal Church, in discussions about war and especially the strategy of preemptive strikes, to seriously consider and utilize the Just War criteria developed over the centuries.” [Resolution A029](#) adopted by the 80th General Convention Resolved, “That Congregations engage with military chaplains so as to learn from their experience with global mission and interreligious dialogue, and from their example as an embedded servant ministry proclaiming and portraying the Gospel beyond the church.”

[Resolution A030](#) of the 80th General Convention- calling for a “Task Force on Pacifism and Just War”- was referred to the 81st General Convention. This resolution, towards fulfillment of the prior Acts of General Convention, aims to promote informed discussion and serious consideration of the just war and pacifism traditions with particular reliance on the perspectives of Episcopal clergy and laypeople engaged in global mission, including military chaplains. The insights and counsel cultivated by the Task Force could not only benefit congregations engaging issues related to war and peace, consistent with the call of Resolution A033 from 2003, but also help service members and veterans to whom military chaplains minister and who are suffering from moral injury as a result of their service in Iraq, Afghanistan and other recent conflicts. The Task Force’s findings could also inform the policy making and advocacy organs of the Church, including the Standing Commission on World Mission and the Office of Government Relations.

The Episcopal Veterans Network Report

Following upon work done with military chaplains, during this biennium, the SCWM has supported the newly formed Episcopal Veterans Network (EVN). The proposed resolution endorsing the formation of, and participation in, the Episcopal Veterans Network would further enable and strengthen the outreach efforts underway to meet the needs of military veterans within the Church, as described below. In organizing these ministries and catalyzing further outreach, the EVN could marshal diocesan initiatives to maximize support for the deserving but underserved veterans' community.

Work with veterans in the network thus far has been focused around the following four pillars:

Organizing and connecting The Episcopal Church and partner organizations: Connections were made with the Military Chaplains Association, which allowed the work of creating Veteran and Military Family Congregations (VMFC) to begin. Currently, there are fifty-seven Episcopal congregations in eighteen states recognized as locations to support veterans, active-duty soldiers, and their families. VMFC recognition provides a visible sign to those who visit a congregation that they understand and are sympathetic to the needs of veterans and their families.

Helping to direct veterans toward existing resources: Each VMFC chooses to implement programs and ministries within the particularities of their communities. The congregations walk alongside the

veterans, advocating that they seek out professional resources with the federal, state, and local agencies. Research consistently shows that clergy and congregation leaders are where veterans first seek assistance in times of distress. Work thus far focuses on familiarizing veterans with resources while providing the spiritual support needed through worship and prayer.

Developing and instituting liturgies and worship: Connections were made with the Corporal Michael J. Crescenz VA Medical Center in Philadelphia, PA, and Moravian Seminary, Bethlehem, PA, to begin developing and instituting liturgy and worship education for clergy. Moravian Seminary provided Community Clergy Training Programs to local clergy that focused on collaboration between the Mental Health Chaplain Services Staff and the community to prevent veteran suicide and provide education about moral injury, trauma, and belonging. Clergy participated in liturgical practices and worship that focused on healing for veterans and their families. Additionally, work on liturgy is currently being focused on through doctoral work at Virginia Theological Seminary.

Marshaling and sharing best practices: The Episcopal Veterans Network focused on participating in training that examined models of congregational efforts to care for those affected by war and military service. Participation in conversations reviewed the role of storytelling, theological reflection, and meaning making through spiritual care and how that shapes our pastoral care and worship. An increased understanding was also acquired to improve spiritual care skills that better serve veterans and families, allowing best practices within and beyond the Episcopal Church to begin development. Leadership of EVN also participated in conferences and training at the International Centre for Moral Injury to provide the network with a global understanding of the causes and impacts of Moral Injury and explore sources of recovery.

Task Force on Translation and Interpretation Report

The Standing Commission on World Mission proposed, and the 80th General Convention created and charged, this Task Force with developing procedures to implement [Resolution A024](#), whose mandate includes: developing a working strategy for determining and prioritizing the types of materials to be translated and meetings to be interpreted, criteria for qualities of translation and interpretation and into which languages, consultation with dioceses and areas that are non-English-speaking, and recommendation for funding levels to implement these strategies. The Task Force is set to conclude its work in 2027.

Recognizing that the Task Force has submitted its own report to the Convention, it bears notation here the ways in which the work of that group affirms, uplifts, compliments and extends the work of the Standing Commission on World Mission. Both translation (written) and interpretation (oral) are essential components to living as the Body of Christ across nations, cultures and languages. The Standing Commission on World Mission applauds the work of the Task Force on Translation and Interpretation, including the development of a matrix to determine types of materials to be translated

and accompanying criteria, as well as messaging about why translation is necessary. The Standing Commission on World Mission further encourages the Task Force's continued work in the upcoming triennium, set to address several key questions: how the languages which become translated are selected, what issues of race and class inform those choices, and how language needs and immigration patterns can be continually assessed to allow for changing responses as needed.

The Office of Global Partnerships Report

“Partnering with God’s world to share the love of Jesus” is the new tagline for the Office of Global Partnerships. Included herein are updates from the Office of Global Partnerships (OGP) on some of their important initiatives. In collaboration with the Standing Commission on World Mission and other partners, the Office of Global Partnerships is developing a churchwide network of Global Mission Advocates to strengthen support for global mission engagement across The Episcopal Church dioceses. OGP hosts a monthly networking call to offer timely topical reports and bring people together to share their global ministry experiences.

The vision of the Office of Global Partnerships and Mission Personnel is to build, nurture, and inspire relationships across The Episcopal Church, the Anglican Communion, and the global community. This office actively develops resources to strengthen and facilitate the global mission engagement of The Episcopal Church and highlights issues of international concern and, in cooperation with colleagues on the Presiding Bishop’s staff, mobilizes engagement in these issues throughout The Episcopal Church, guided by the mission priorities adopted by General Convention, and the mission priorities of the Presiding Bishop of Evangelism, Reconciliation, and Care of Creation.

The area-specific partnership officers develop and nurture relationships with Anglican, ecumenical, and inter-religious partners in each region, and work closely with The Episcopal Church’s Mission Personnel Office to develop new missionary placements and opportunities, to support missionary discernment and training, and to ensure on-site pastoral support for missionaries in the field.

Mission Personnel continues to rebuild the Episcopal Volunteers in Mission (EVIM) and the Young Adult Service Corps (YASC) programs following the COVID pandemic. During the time of the lockdown, OGP found creative ways to support work being done by dioceses along the U.S.-Mexico border. In July 2024, we will host a young adult pilgrimage focusing on migration, in partnership with dioceses in Central America as well as the U.S.-Mexico border dioceses.

On behalf of the Presiding Bishop, the Episcopal UN office represents and advocates at the United Nations on priorities as guided by General Convention. The office empowers Episcopalians in their UN engagement and collaborates closely with the Anglican Communion UN office and other faith-based UN partners on mutual priorities.

In 2022, the Office of Global Partnerships had a team present at the Lambeth Conference, supporting the work of our bishops during that meeting in Canterbury, England. OGP also communicates regularly with the Anglican Communion Office, Lambeth Palace, the Anglican Alliance, Episcopal Relief and Development, and others, to further the vision and commitment of the Church in the Communion.

In support of theological education beyond the United States and the implementation of [Resolution A018](#) passed by the 80th General Convention of The Episcopal Church, the Office of Global Partnerships, through its regional officers, accomplished the following:

- In Latin America and the Caribbean, OGP works closely with The Commission on Theological Education for Latin America and the Caribbean (CETALC in Spanish) by facilitating the distribution of funds from the CETALC Trust fund. The Office works closely with all participating dioceses in Central and South America and with the office of Latino and Hispanic Ministries in the sharing of Spanish and Portuguese resources.
- In Asia and the Pacific, OGP is facilitating a meeting of Anglican Seminary Deans from Asia and the Pacific to meet in Japan late 2023, with the aim to promote networking and resource sharing. OGP also works closely with USPG (United Society Partners in the Gospel) in support of theological education in Asia and the Pacific.
- In Africa, OGP is working on a program for “Leadership Development and Theological Education Digital Platform for West Africa”. Once complete, it will host resources from the IONA COLLABORATIVE and make them available across the 17 dioceses spread out in 8 countries (Cameroon, Cape Verde, Gambia, Ghana, Guinea, Liberia, Senegal, and Sierra Leone). Faculty training and orientation will commence late Fall 2023.
- In the Middle East, OGP works closely with the Office of Government Relations in advocating for peace in the region, hosts networking calls, and facilitates the Good Friday Offering to help provide needed funds for the region.

OGP is working closely with the Anglican Communion Office in all these efforts networking across the Anglican Communion to promote theological education that is contextual and culturally appropriate.

Youth Formation in World Mission Report

Acknowledging the many ways in which the work of formation overlaps with the work of embracing a new paradigm of global mission work (doing *with* as opposed to doing *for*, as described in the [Guiding Principles](#) developed by the Standing Commission on World Mission), the SCWM has begun conversations during this biennium with the Standing Commission on Formation and Ministry Development, as well as relevant Episcopal Church offices and departments, to encourage establishing ways of supporting each other’s work. The shared goal of facilitating the understanding of our service

to God and others in a global context as an inherent expression of our individual faith is perhaps best featured and examined through combined efforts and differentiated lenses.

The genesis of this work was a group of young people who participated in a global mission workshop while attending the Episcopal Youth Event in Baltimore in 2023. The youth were eager to learn about such programs at Young Adult Service Corps and Episcopal Volunteers in Mission, but also expressed desire to explore formative experiences and discern their vocations during their high school years, articulating a need for such faith experiences in a global or intercultural context. Currently, only some youth have access to these opportunities, depending upon which parish, diocese or household to which they belong and what the resources those communities can offer. These requests from youth prompted rich conversation between the Standing Commission on World Mission, the Office of Global Partnerships and then the Standing Commission on Formation and Ministry Development in terms of what might be needed, what might be feasible, and how best to continue the work. The result of those conversations is the proposed resolution contained in this report, which calls for the establishment of a Task Force to explore these questions and to conduct an audit of programs and ministries currently at work in The Episcopal Church, uplift successful programs while making them more widely available and to create resources as necessary to grow the quality and quantity of global mission opportunities for young people, ages 13-21.

Collaboration with other Interim Bodies

During this biennium, the SCWM leadership met regularly with the Task Force on Care of Creation and Environmental Racism to collaborate on work and resolutions. For example, the SCWM joined with the Task Force in submitting a biodiversity resolution to Executive Council in April 2023 and supported the [Fossil Fuel Treaty](#) resolution submitted to Executive Council in October 2023. The SCWM also heard a presentation by the Task Force on Imagining a Church Grounded in Social Justice as Christian Ministry and the SCWM leadership met with the leadership of the Standing Commission on Formation and Ministry Development to share learning.

The SCWM met with the Standing Commission on Ecumenical and Interreligious Relations (SCEIR) and the leadership of the two Commissions communicated regularly to share needs and learning in an ongoing way. The two commissions collaborated especially on the SCWM work of colonialism, rising religious nationalism and the Anglican Communion.

The SCWM has submitted a memorial commending the [World Council of Churches Unity Statement](#) entitled “Christ’s Love Moves the World to Reconciliation and Unity” which was adopted at the WCC Assembly held in Germany in 2022 and at which the Episcopal Church was represented.

Covenant and Bilateral Relationships Reports

The Episcopal Church has covenant agreements with IARCA and with Liberia, and bilateral agreements with Brazil, Mexico and the Philippines. Each of these agreements has committees, comprised of both Episcopal Church members and members from the covenant/bilateral partners. The Liberia committee unfortunately was not constituted during this biennium, but the goal is to have it constituted in the early part of the next triennium. Below are reports from each of the Covenant and Bilateral Committees that met during this biennium.

MEXICO BILATERAL COMMITTEE

Members

Rt. Rev. Lucinda Ashby, Chair	El Camino Real, VIII	2024
Rev. David Chavez	Arizona, VIII	2024
Rev. Don Compier	Kansas, VI	2024
Rt. Rev. Jeff Fisher	Texas, VI	
Jody Guerra	Texas, VI	2024
Rev. David Copley, Staff		
Rev. Glenda McQueen, Staff Liaison		
The Most Rev. Michael Curry, Ex officio		
Ms. Julia Ayala Harris, Ex officio		
Revdo. Carlos Aguila		
Revdo. Ana Luisa del Aguila, Exofficio		
Revsmo. Ricardo Gomez Osnaya	Occidente	
Laura Gracia, Exoficio		
Revsmo. Sally Sue Hernandez	Mexico	
Dolores Huerta		
Marisela Lathrop		
Sarai Osnaya	Occidente	
Revsmo. Oscar Pulido	Norte	
Revsmo. Julio Martin Trejo	Sureste	
Revsmo. Enrique Trevino Cruz	Cuernavaca	
Revdo. Victor Zuniga		

Summary of Work

The Bilateral relationship between La Iglesia Anglicana de Mexico and The Episcopal Church was established in 2020 for the purpose of “mutual ministry, shared collaboration, Christian relationship and Christian communion and focus on sustainability and projects that promote self-reliance.” The

Bilateral Committee is charged with meeting once in the triennium to develop relationships between IAM and TEC.

The Bilateral Committees met together this biennium via Zoom, once in September 2022, and once in July 2023. In each meeting, the conversation was encased in holy informality, with the intent of sharing mutual experiences, concerns and opportunities. Topics such as education and formation of clergy and laity, as well as celebrations of emerging safely from the pandemic, have been at the forefront of our conversations. A general feeling of shared camaraderie in ministry emerges more with each conversation.

The Bilateral Committee is grateful for the opportunities afforded by using zoom to be able to gather more than once in the triennium, and is especially grateful for the administrative gifts of Marisela Lathrop who keeps the minutes and helps the Bilateral Committee to gather effectively.

BRAZIL BILATERAL COMMITTEE

Members

Rev. Adam Shoemaker, Chair	South Carolina, IV	2024
Rev. Lorraine Mills-Curran, Member	Massachusetts, I	2024
Rev. Edwin Beckham, Member	Long Island, II	2027
Ms. Nina Boe, Member	New York, II	2027
Rev. David Copley, Staff		
Rev. Glenda McQueen, Staff Liaison		
Ms. Julia Ayala Harris, ex officio		
The Most. Rev. Michael Curry, ex officio		
The Rt. Rev. Eduardo Grillo, Chair,	Rio de Janeiro	
The Very Rev. Gustavo Gilson Souza de Oliveira		
Ms. Paula de Mello		
Ms. Christina Takatsu Winnischofer		
Ms. Selma Rosa		

Summary of Work

The Bilateral relationship between La Igreja Episcopal Anglicana do Brasil (IEAB) and The Episcopal Church was established in 1991 for the purpose of “strengthening the bonds of friendship, love, and affection” between our provinces and in so doing, “deepening the faith of the People of God who make up these two churches.” The Bilateral Committee is charged with meeting once in the triennium to develop relationships between IEAB and TEC.

The Bilateral Committees met together this biennium via Zoom, once in September 2023, and once in December 2023. In each meeting, committee members shared mutual experiences, concerns and opportunities while building on work from the past. Topics such as how to work to better inform provinces of this relationship as well as partner together on education and formation of clergy and laity, and exchanges between dioceses have been at the forefront of conversations. Also, scheduling a webinar that could offer reflections on common challenges facing our churches was discussed. There is also hope of the TEC committee visiting Brazil in 2024. A general feeling of shared camaraderie in ministry emerges more with each conversation.

The Bilateral Committee is grateful for the opportunities afforded by using Zoom to be able to gather more than once in the biennium, and especially grateful for the administrative gifts of the Rev. Lorriane Mills-Curran, serving as secretary, keeping the minutes and helping the Bilateral Committee to gather effectively.

PHILIPPINE BILATERAL COMMITTEE

Members

The Rt. Rev. Robert Fitzpatrick Chair	Hawaii	2030
The Rt Rev Diane Jardine Bruce, Member	Los Angeles	2024
Rev. Canon Robert Hino Member	Hawaii	2024
Mr. Henry Bibelheimer, Member	Oklahoma	2027
Rev. David Copley, Staff		
Rev. Bruce Woodcock, Staff Liaison		
Ms. Julia Ayala Harris, ex officio		
The Most. Rev. Michael Curry, ex officio		

Episcopal Church in the Philippines

Bishop Frenzel Ray Piluden (chair)
Rev. Gloria Lita Mapangdol
Rachel Angela Anosan
Charles Homer Copanut
Floyd Lalwet - staff

Summary of Work

The Bilateral relationship between The Episcopal Church of the Philippines (ECP) and The Episcopal Church (TEC) (also known as the JCPC or Joint Committee on Provincial Companionship) was established in 1982 as a step towards moving towards an independent church. The Bilateral Committee is charged with meeting once in the triennium to develop relationships between ECP and TEC.

The Bilateral Committees met on multiple occasions this biennium via Zoom, and once in person meeting in Guam in December 2023. This meeting had a focus on sharing Provincial updates, to continue Province to Province communications and to seek ways to promote relationship building via the Global Mission Advocate Network in TEC. Following the meeting, Bishop Fitzpatrick hosted a house of bishops training workshop.

Ecumenical cooperation is another mainstay of the relationship keeping in touch with ongoing efforts to coordinate programs and project development with the Philippine Independent Church (IFI).

As both Provinces look ahead to Primate elections in 2024, it will be important to continue the bilateral JCPC dialogue between TEC and ECP.

La Iglesia Anglicana de la Region Central de America (IARCA) Covenant Committee

Members

Watt, Ms. Linda, Chair	Western North Carolina, IV	2024
Carmona, Mr. Wilfredy	Dominican Republic, IX	2027
Denney Zuniga, The Rev. Amy	El Camino Real, VIII	2027
Gates, The Rt. Rev. Alan	Massachusetts, I	2024
Sanchez, The Rev. Consuelo	Honduras, IX	2027
Ayala Harris, Ms. Julia, Ex officio	Oklahoma, VII	
Curry, The Most Rev. Michael, Ex officio	North Carolina, IV	

Primate of IARCA and Bishop of El Salvador:

The Rt. Rev. Juan David Alvarado

Provincial Secretary:

The Rev. Ramón Ovalle,
Rector, Catedral Episcopal Santiago Apóstol, Guatemala City

Summary of Work

The IARCA Covenant Committee, constituted in May 2023, set its goal for this biennium as the opening of a dialogue with its counterparts in Central America on building a stronger ongoing relationship, including the possibility of re-envisioning the current covenant which will celebrate its thirtieth anniversary in 2027.

Actions enumerated in several of the Covenant's clauses have been completed over the years. Others are ongoing, including notably financial support, technical assistance, and many areas of ministry partnership. Committee members acknowledge that misunderstandings and anxiety have developed because of financial decisions made on the part of The Episcopal Church; also noted is that reduced interactions, in large part due to Covid restrictions, have resulted in diminished relationships.

In conversation with the Primate and the Provincial Secretary of IARCA, the committee identified several areas of conversation intended to begin in the remainder of this biennium, and that will hopefully continue in the next triennium. These include: a) deepening the understanding of the socio-political context of the IARCA countries, with the hope of strengthening our ability to support the dioceses in their difficult circumstances; b) talking through the financial circumstances of TEC and IARCA with the intention of better mutual understanding; c) revitalizing personal relationships among bishops; increasing the awareness of grant and other opportunities available to the IARCA dioceses, including not only those offered by The Episcopal Church, but also at the diocesan and parish levels; and d) exploring ways in which missional and personal relationships can be fostered and communicated both at the churchwide level and more informally.

With these potential areas of focus, the committee hopes to meet in person in Central America with its IARCA counterparts before General Convention to foster increased understanding and relationship-building.

References for the summary of work

Anglican Alliance- <https://anglicanalliance.org>

Anglican Communion - <https://www.anglicancommunion.org>

Anglican Communion Forest- <https://www.communionforest.org>

Anglican Communion Office of Gender Justice <https://www.anglicancommunion.org/mission/gender-justice.aspx>

Anglican Communion Office of Gender Justice Resource on “God’ Justice: Theology and Gender Justice” - <https://www.anglicancommunion.org/mission/gender-justice/gods-justice-theology-and-gender-justice.aspx>

Anglican Communion Networks - <https://www.anglicancommunion.org/community/networks.aspx>

Anglican Consultative Council - <https://www.anglicancommunion.org/structures/instruments-of-communion/acc.aspx>

Anglican Consultative Council ACC18 - <https://www.anglicancommunion.org/structures/instruments-of-communion/acc/acc-18.aspx>

Anglican Cycle of Prayer - <https://www.anglicancommunion.org/resources/cycle-of-prayer/download-the-acp.aspx>

Book of Common Prayer - <https://www.bcponline.org>

Constitution and Canons of The Episcopal Church - <https://generalconvention.org/constitution-and-canons/>

Convention on Biological Diversity – <https://www.cbd.int>

Episcopal Church’s Department of Faith Formation - <https://www.episcopalchurch.org/ministries/faith-formation/>

Episcopal Church of Liberia - <http://episcopalchurchliberia.org>

Episcopal Relief and Development – <https://www.episcopalrelief.org>

Episcopal Relief and Development's 16 Days of Activism Toolkit- <https://www.episcopalrelief.org/what-we-do/integrated-approach/16-days-of-activism-toolkit/>

Episcopal Volunteers in Mission - <https://www.episcopalchurch.org/ministries/global-partnerships/episcopal-volunteers-in-mission/>

Episcopal Youth Event - <https://eye.episcopalchurch.org/en/about-3/>

Fossil Fuel Non-Proliferation Treaty Initiative - <https://fossilfuel treaty.org>

Global Episcopal Mission Network – <https://www.gemn.org>

Guiding Principles for World Mission “Becoming a World Where Love is the Way” - <https://www.episcopalchurch.org/guiding-principles-for-world-mission/>

Inter-Anglican Standing Commission on Faith, Unity and Order (IASCFUO) -

https://www.anglicancommunion.org/media/501108/en_dept_IASCUFO_Good-Differentiation.pdf

Lambeth Conference - <https://www.lambethconference.org>

Marks of Mission – <https://www.anglicancommunion.org/mission/marks-of-mission.aspx>

Military Chaplains Just War Education Project - <https://www.episcopalchurch.org/armed-forces-and-federal-ministries/just-war-education/>

Office of Global Partnerships - <https://www.episcopalchurch.org/ministries/global-partnerships/>

Office of Government Relations - <https://www.episcopalchurch.org/ministries/office-government-relations/>

Office of the Suffragan Bishop for Armed Forces and Federal Ministries (AFFM) - <https://www.episcopalchurch.org/armed-forces-and-federal-ministries/>

Office of the Suffragan Bishop for Armed Forces and Federal Ministries Just War Education project- <https://www.episcopalchurch.org/armed-forces-and-federal-ministries/just-war-education/>

Resolution A016 adopted by 80th General Convention “Adopt, Study, and Promote Guiding Principles for World Mission & Initiate Global Mission Advocate Program” - https://www.episcopalarchives.org/sites/default/files/gc_resolutions/2022-A016.pdf

Resolution A018 adopted by 80th General Convention “Teaching World Mission and Theological Education Beyond the United States” - https://www.episcopalarchives.org/sites/default/files/gc_resolutions/2022-A018.pdf

Resolution A024 adopted by 80th General Convention “Create a Task Force on Translation and Interpretation” - https://www.episcopalarchives.org/sites/default/files/gc_resolutions/2022-A024.pdf

Resolution A029 adopted by 80th General Convention “Support for Military Chaplains” - https://www.episcopalarchives.org/sites/default/files/gc_resolutions/2022-A029.pdf

Resolution A030 adopted by 80th General Convention “Task Force on Pacifism and Just War” - https://www.episcopalarchives.org/sites/default/files/gc_resolutions/2022-A030.pdf

Resolution A033 adopted by 74th General Convention “Urge Church Members to Study Just War Theory and Criteria” - https://episcopalarchives.org/cgi-bin/acts/acts_resolution-complete.pl?resolution=2003-A033

United Nations Commission on the Status of Women - <https://www.unwomen.org/en/csw>

United Nations 16 Days of Activism- <https://www.unwomen.org/en/what-we-do/ending-violence-against-women/unite/16-days-of-activism>

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Unity Statement by World Council of Churches - <https://www.oikoumene.org/sites/default/files/2022-09/A05rev1-Unity-Statement.pdf>

World Council of Churches - <https://www.oikoumene.org>

Young Adult Service Corps - <https://www.episcopalchurch.org/ministries/global-partnerships/young-adult-service-corps/>

Continuance Recommendations

The Standing Commission on World Mission recommends that this Commission continue to operate in the next triennium in order to:

- Promote the development of the Global Mission Advocates Network to encourage and support broader participation and further the work of global mission;
- Research and draft a report on how global mission in the Episcopal Church is impacted by rising religious nationalism, identify steps to educate others involved in global mission on this impact, and work with Anglican Communion partners and ecumenical partners to promote religious harmony and tolerance;
- In collaboration with the proposed Task Force on ‘Countering the Colonial Mindset’ review and monitor the development of educational materials for Dioceses, churches, and mission partners to use in their work;
- Continue work begun in this biennium to address and reduce global gender-based violence against women and girls;
- Continue work begun in this biennium to advocate for theological education on world mission and promote development of courses for Anglican studies for jurisdictions outside the United States;
- Continuing to support the work of the Task Force on Translation and Interpretation to review and monitor adherence to previous commitments made by The Episcopal Church to provide translations of materials into languages other than English for use by The Episcopal Church;
- Continue collaboration with the Presiding Bishop’s staff in the Office of Global Partnerships and the Office of Governmental Relations and mission partners such as the Global Episcopal Mission Network and mission agencies to carry out Episcopal Church mission priorities and strengthen The Episcopal Church's witness around the world;
- Continue to support and uplift our Covenant and Bilateral agreements; and
- Continue to work with other interim bodies to share the global perspective.

Budget Recommendations

In addition to funding for the Office of Global Partnerships, the Standing Commission on World Mission recommends the following budget allocations, details of which are shared in the Committee Work and Resolutions sections of this report:

\$150,000 to create a task force and publish educational materials for countering of the colonial mindset for use by dioceses, churches, and mission partners;

\$75,000 to financially support the triennial in person gathering of the Global Mission Advocates Network by defraying the cost for each advocate;

\$90,000 for the establishment of an Episcopal Veteran's Network and for costs associated with such network and a part-time coordinator;

\$30,000 for the establishment of a Task Force on Youth Formation and World Mission.

\$30,000 for the creation of a Task Force on The Episcopal Church-Anglican Communion Relationships

Proposed Resolutions

A080 Create a Task Force on Countering the Colonial Mindset

Resolved, That the 81st General Convention reckon with the history and present reality of colonialism in The Episcopal Church and its dual identity as a former colony and a colonizing power; and be it further

Resolved, That General Convention recognize the following working definition of the colonial mindset as: “the living legacy of colonialism in the 21st century exemplified by the supremacy of Western/European mindsets, modes of thinking, cultural and economic systems, and bodies in former colonial states and their partners”; and be it further

Resolved, That General Convention create a Task Force on Countering the Colonial Mindset, whose mandate include, but be not limited to, researching and highlighting historic and present realities of the colonial mindset in our common life, and establishing educational materials for dioceses, churches, and mission partners to use in their work and ministry; and be it further

Resolved, That the task force begin its work no later than January 1, 2025 and conclude its work at the conclusion of the 82nd General Convention with the submission of a report with recommendations to the 82nd General Convention; and be it further

Resolved, That the membership of this task force be appointed by the Presiding Bishop and the President of the House of Deputies and include up to two Bishops appointed by the Presiding Bishop; up to four Clergy and up to ten Lay Persons appointed by the President of the House of Deputies, with special consideration given to inclusion of faculty from accredited Episcopal seminaries or Episcopal/Anglican formation centers within university systems and partners with specialties in Colonialism and Missiology; and be it further

Resolved, The General Convention request a budget allocation \$150,000 to create such a task force and publish educational materials for countering the colonial mindset for use by dioceses, churches, and mission partners.

EXPLANATION

At the 80th General Convention, the Standing Commission on World Mission was tasked with preparing a report on the impact of colonialism on the Episcopal Church. The need for such a report was clear from the outset, yet what has emerged as a primary focus is the continuing impact of the colonial mindset on the Church today. Our missional institutions are replete with organizations, actors and systems that offer a preference for white, European and male voices in the allocation of funds, people and attention. The Anglican Church, the Episcopal Church, and its missional organs have often been the voice of empire and may still function that way through lack of awareness.

From the beginning, the missionary work of the Episcopal Church was wrapped up in the broader effort at colonization. In fact, the first missionary efforts undertaken in the Church were under the auspices of the Colonization Society. Looking back, Episcopal missionary efforts, while always undertaken with the goal of propagating the Gospel all over the world, also suffered from the unmistakable connection to colonialism.

Therefore, the Standing Commission on World Mission urges the General Convention to (a) create a Task Force on Countering the Colonial Mindset and (b) allocate adequate funds for its creation and work which includes researching and highlighting historic and present realities of the colonial mindset in our common life, and establishing educational materials for dioceses, churches, and mission partners to use in their work and ministry. This task force would report back to the 82d General Convention.

A081 Combat Rising Religious Nationalism

Resolved, That the 81st General Convention acknowledge the urgent issue of rising religious nationalism as a deeply rooted issue, both domestically and globally, as it rises to the forefront as a continued and troubling phenomenon; and be it further,

Resolved, That The Episcopal Church as a Body of Christ lament the negative impact of rising religious nationalism in the promotion of violence against marginalized groups, adversely affecting social, cultural, and historical contexts; and be it further

Resolved, That General Convention encourage individuals, congregations, dioceses and other communities within the Church to educate themselves more thoroughly about this critical issue and its negative impact on marginalized groups; and be it further

Resolved, That General Convention urge The Episcopal Church and its mission-related entities to combat rising religious nationalism in partnership with inter-religious, ecumenical, and Anglican Communion partners.

EXPLANATION

Both domestically and globally, extremism is at a crisis point, including religious nationalism. Religious nationalism is the intersection of religious identity and nationalist ideologies within a specific country or nation. Rising religious nationalism includes both the “Christian nationalist” movement in the United States of America and global forms of extremism. These movements promote violence against marginalized groups, severely affecting social, cultural and historical contexts.

Since the mission of The Episcopal Church, as stated in the Book of Common Prayer’s catechism, is “to restore all people to unity with God and each other in Christ (pg. 855),” the Episcopal Church has a

responsibility to acknowledge and identify rising religious nationalism given our presence domestically and globally, to identify incidents of this movement and to call them out urgently. Incidents may include turmoil or volatility in a social context, life-threatening behaviors against a people or religion, an historically based continuation of systemic hate crimes, and the targeting of minority groups.

The Standing Commission on World Mission offers this resolution to call for the recognition and acknowledgment of rising religious nationalism and urges The Episcopal Church to combat rising religious nationalism in partnership with inter-religious, ecumenical, and Anglican Communion partners.

A082 Support the Episcopal Veterans Network

Resolved, That the 81st General Convention acknowledge and recognize the burgeoning Episcopal Veterans Network which is a volunteer initiative within and beyond the Episcopal Church to minister to the material, mental, social and spiritual needs of veterans of the U.S. Armed Forces and their families; and be it further

Resolved, That General Convention recognize that the Episcopal Veterans Network is to be governed by a volunteer steering committee of diverse clergy and lay people, in coordination with the Standing Commission on World Mission, the Office of the Suffragan Bishop for Armed Forces and Federal Ministries and other church bodies which may intersect with this work; and be it further

Resolved, That General Convention encourage all parishes, dioceses, and jurisdictions to become familiar with the Episcopal Veteran's Network and its resources in order to better serve the veterans in their communities; and be it further

Resolved, That General Convention request a budget allocation of \$90,000 for a part-time coordinator to oversee EVN and for support of other costs associated with the growth of EVN.

EXPLANATION

Following their honorable service in Korea, Vietnam, Afghanistan, Iraq and other conflicts of living memory, countless veterans are suffering from loneliness, homelessness, alienation, discrimination, depression, and other physical and emotional ills. Too many are also afflicted with post-traumatic stress disorder (PTSD) and, in particular "moral injury," an increasingly recognized form of PTSD involving the wounding of veterans' souls resulting from the ethically wrenching combat experiences they have witnessed or engaged in.

The Episcopal Veterans Network is being launched under the auspices of the Standing Commission on World Mission (SCWM), building upon the Commission's recent work to provide additional educational

resources to military chaplains in coordination with the Office of the Suffragan Bishop for Armed Forces and Federal Ministries (AFFM).

By elevating the unique pastoral, liturgical, and prophetic charisms of our church, and our special, historic relationship with the U.S. military, the goal of this network is to facilitate greater life-enhancing, life-healing, and even life-saving care for veterans who identify with The Episcopal Church. Many veterans lack the awareness and wherewithal to find the fellowship and assistance they need to overcome these challenges and avoid heartbreaking outcomes, including substance abuse, domestic violence, and suicide in shocking numbers. The Episcopal Church has much to offer to these hurting veterans and their loved ones, and many congregations, especially those near military bases and communities, are already engaged in thriving ministries to this substantial segment of our membership.

Initially, the Episcopal Veteran's Network (EVN) will focus on several pillars, including:

- Helping point veterans toward existing public, private, volunteer, and religious resources that can help them access the services, benefits and care they have earned and deserve.
- Organizing and connecting the church's congregations, dioceses, provinces, commissions, and partner organizations around this critical mission.
- Developing and instituting liturgies and other worship resources devoted to veterans and their unique spiritual needs.
- Marshalling and sharing best practices for veterans' outreach and care from within and beyond the Episcopal Church.

EVN aims to complement and amplify these good works and those of the Veterans Administration, Military Chaplains Association, and other governmental and non-profit service organizations, by helping connect more hands and hearts with our nation's under-cared-for veterans.

In addition to the funding requested by this resolution, EVN will seek grants, contributions and donations from supportive bishops, congregations, agencies and organizations. All of these resources will be devoted to supporting a part-time clerical director; launching and maintaining a resource-rich website; engaging partner congregations and communities, including participating in relevant conferences and gatherings; and developing liturgies and programming in conjunction with church authorities.

Ao83 Affirm Anglican Connections

Resolved, That the 81st General Convention affirm our continued relationship with the broader Anglican Communion as reflected through the work of the Anglican Consultative Council and the other Instruments of Communion; and be it further

Resolved, That General Convention give thanks for, and encourage participation in, the many networks which exist in the Anglican Communion such as in the areas of youth, family, indigenous, peace and justice, women, environment, health and community, safe church, interfaith concerns, church planting and colleges and universities; and be it further

Resolved, That General Convention affirm the need to continue to work across theological, cultural and social differences, and encourage that all Episcopal leaders take time to consider the proposal from the Inter-Anglican Standing Commission on Faith, Unity and Order (IASCFUO) presented at the meeting of the Anglican Consultative Council (ACC-18) in February 2023; and be it further

Resolved, That General Convention encourage the use of the Anglican Cycle of Prayer Calendar issued by the Anglican Communion Office across the Episcopal Church thus uniting Anglicans around the world in prayer.

EXPLANATION

As the first sentence in the Constitution of the Episcopal Church's states: "The Protestant Episcopal Church in the United States of America, otherwise known as The Episcopal Church (which name is hereby recognized as also designating the Church), is a constituent member of the Anglican Communion, a Fellowship within the One, Holy, Catholic, and Apostolic Church, of those duly constituted Dioceses, Provinces, and regional Churches in communion with the See of Canterbury, upholding and propagating the historic Faith and Order as set forth in the Book of Common Prayer."

The Anglican Communion is a family of 42 autonomous and independent-yet-interdependent national, pan-national and regional churches in communion with the See of Canterbury. All of these provinces are guided by recommendations from the four Instruments: the Archbishop of Canterbury, the Lambeth Conference, the Primates' Meeting and the Anglican Consultative Council.

As constituent members of the Anglican Communion, it is imperative that The Episcopal Church – as individuals, dioceses, and the Church—affirm our support of the Anglican Communion as set forth in this resolution. To be in relationship does not necessitate complete agreement on all issues. Rather, the voice of The Episcopal Church is vital in upholding and advocating for the values of God's liberating love throughout the world.

A084 Join The Communion Forest

Resolved, That the 81st General Convention , in support of the Anglican Consultative Council resolution passed at ACC 18 in Ghana in February 2023, recognizes that the integrity of creation is under threat and at risk of collapse and there is urgent need to reduce our carbon footprint and protect biodiversity; and be it further

Resolved, That the Episcopal Church affirms the potential of the Communion Forest initiative launched as a legacy of the 2022 Lambeth Conference; and be it further

Resolved, That the Episcopal Church join with other Churches of the Communion to join in this initiative to be ambitious in using their God-given assets, to weave creation care into the spiritual and liturgical life of the Church; and be it further

Resolved, That General Convention commends the collaboration of the Anglican Alliance and Anglican Communion Environmental Network, and encourages the dioceses, seminaries, congregations and other ministries in the Episcopal Church to share with them information about their existing and new activities.

EXPLANATION

God's precious gift of Creation is under threat due to pollution and subsequent climate change and is at risk of collapse. As the Body of Christ, Episcopalians everywhere have an obligation and responsibility to act in accordance with the teaching of Christ and our Holy Scripture in preserving and nurturing our planet. In 2022, the Lambeth Conference launched the Anglican Communion Forest Initiative to join together in tree growing and ecosystem conservation, protection and restoration throughout the world. The initiative, which is a global response encouraging local work, is a way for members of the Anglican Communion to come together both in prayer and action to engage science-based responses to climate change through the lens of our shared faith. The initiative offers resources to incorporate planting trees into liturgical practice and sacraments, such as baptism and marriage, to eradicate the often-ambiguous relationship the Church has with nature. Our faith teaches us that God made all things, and therefore we must steward and care for all of Creation.

A085 - Support for the Global Mission Advocates Network

Resolved, That the General Convention commend the dioceses who have appointed a Global Mission Advocate pursuant to Resolution A016 from the 80th General Convention; and be it further

Resolved, That General Convention strongly encourage each diocese, jurisdiction, Episcopal seminary, and diocesan school of ministry to appoint one person to serve as a Global Mission Advocate; and be it further

Resolved, That General Convention direct dioceses to support the mission and work of their appointed Global Mission Advocates, working with the Office of Global Partnerships and the Standing Commission on World Mission, by providing opportunities for sharing within the diocese about the importance of global mission and the range of resources available, and by providing financial support for attendance at the triennial in-person meeting of the Global Mission Advocates Network; and be it further

Resolved, That the General Convention request a budget allocation of \$75,000 to financially support the in-person gathering in the next triennium of the Global Mission Advocates Network.

EXPLANATION

Global mission is an integral part of the identity of The Episcopal Church, known officially as The Domestic and Foreign Missionary Society. The voice of The Episcopal Church is vital in upholding and advocating for the values of God’s liberating love throughout the world

The 80th General Convention passed Resolution A016 which encouraged each diocese, jurisdiction, Episcopal seminary, and diocesan school of ministry to appoint at least one person to serve as a Global Mission Advocate to be part of the Global Mission Advocates Network. The purpose of establishing the Global Mission Advocates Network is to ensure that the Episcopal Church remain committed to the spreading of the Gospel and the furtherance of Christ’s mission of love and compassion in the world in a sustainable and responsible manner.

As of December, 2023, approximately 50 dioceses had appointed Global Mission Advocates, which means less than half of Episcopal dioceses are represented in the Network. The Standing Committee on World Mission strongly believes that this limited participation hampers the opportunity for The Episcopal Church to fully live out its global mission mandate.

This resolution strongly encourages all dioceses to appoint a Global Mission Advocate and directs dioceses to support the mission and work of their appointed advocates. In addition, this resolution requests that General Convention allocate \$75,000 to support the Global Mission Advocates Network by defraying the costs of attending the triennial meeting of the Global Mission Advocates Network in order to encourage and support broader participation and further the work of global mission.

A086 Create a Task Force for Youth Formation and World Mission

Resolved, That the 81st General Convention establish a Task Force for collaborative research, relationship-building and program development for the purpose of identifying, sharing and developing global mission opportunities for youth (ages 13-21) in The Episcopal Church; and be it further

Resolved, That the Task Force gather information on programs and resources currently in use across The Church, highlighting particularly the areas of intersection that exist between the formation of Christian identity and the expression of God's love through loving our neighbors near and far and especially in global and intercultural contexts, and be it further

Resolved, That the Task Force may be comprised of membership including, but not limited to, from Interim Bodies, relevant Episcopal Church entities, youth (ages 13-21), and representation from domestic and non-domestic dioceses with special consideration given to inclusion of persons from non-English speaking dioceses, jurisdictions, and mission areas; and be it further

Resolved, That the General Convention request a budget allocation of \$30,000 for the implementation of this resolution.

EXPLANATION

Acknowledging the myriad ways in which world mission and faith formation intersect with other disciplines and ministries in The Episcopal Church and beyond, and lifting up the increasing need for vocational discernment and formation opportunities for young people, the Standing Commission on World Mission and The Standing Commission on Formation and Ministry Development call for the creation of a Task Force to study, network and share resources regarding the formation and discernment of young people in global and intercultural contexts. The two Commissions seek to work in partnership with each other, the relevant TEC offices and stakeholders across the Church including, but not limited to, the Standing Commissions for World Mission and Formation and Ministry Development, and Office of Youth and Young Adult and Campus Ministries, the Office of Global Partnerships, the department of Faith Formation, the Young Adult Service Corps, Episcopal Camps and Conference Centers, seminaries and diocesan formation programs.

Meeting the emerging needs of youth in the context of a changing Church and world requires new ways of collaborating and imagining God's dream for our world. Currently, there are no ways for youth to access global mission travel, pilgrimage or learning opportunities unless they are able to access it privately or are resident in a diocese or parish that offers such programming. Such inequality must be Resolved by sharing opportunities more broadly across the Church.

This Task Force would do the research of discovering what resources and programs are working well to highlight formation as growth experience, and global mission as an inherent expression of our Christian faith in the Episcopal tradition. Intercultural programming could be included in this body of work, as welcoming new Americans and immigrants through migration ministries is a facet of global work, conducted within our own communities. The work of the Task Force over the course of the upcoming triennium may include lifting up existing resources like the Toolkit for Pilgrimage, exploring opportunities for collaboration (even across dioceses) ensuring all young Episcopalians have access to intercultural and international programming, adapting the Guiding Principles and Global Mission Toolkit put out by SCWM for use specifically with persons aged 13-21, identifying opportunities for

dioceses/parishes with global mission experience to become mentors to those interested in growth, exploring ways to incorporate/adapt anti-racism and anti-colonialism training for young people and coupling that learning with opportunities to engage that work as Episcopalians in the world, creating opportunities for vocational discernment for youth interested in international and advocacy work, making known the possibilities to work alongside our global partners within the structure of the church, and potential for collaboration with the new Global Mission Advocates Network through the Standing Commission on World Mission.

Acknowledging that world mission and migration ministries will only increase in volume and urgency as climate change redefines our human existence, and that the landscape for young peoples' formation and participation in church is changing rapidly, a Task Force for sharing, resourcing and innovating in these areas in the Church is essential.

A087 Collect Data on Meeting Sustainable Development Goals

Resolved, That the 81st General Convention of The Episcopal Church, direct the Office of Global Partnerships to facilitate the creation of a churchwide data survey and to collect data on participation in the United Nations Sustainable Development Goals (SDGs) as a measure of how The Episcopal Church is meeting these goals; and be it further

Resolved, That such data collected be shared publicly as a means to encourage and ignite further participation across the Church, inform future action and be shared in report form to the 82nd and 83rd General Conventions for such uses.

EXPLANATION

The 80th General Convention adopted the resolution (2022-A020) submitted by the SCWM: Support Decade of Action to Achieve Sustainable Development Goals (SDGs). When the member states adopted the SDGS in 2015, the goal was to achieve the targets for the 17 SDGs by 2030. Given the Episcopal Church's 'special consultative status' in the Economic and Social Council of the United Nations, it is critical that data be collected from across our Church as to how we are meeting these goals in our congregations and dioceses. The SCWM proposes a resolution to direct the Office of Global Partnerships to facilitate the creation of a churchwide data survey and collection of data in preparation for a report back to the 82nd and 83rd General Convention, in addition to sharing this data and stories with relevant United Nations entities and in the context of the annual High-Level Political Forum on the Sustainable Development Goals.

A088 Consult with the Office of Global Partnerships

Resolved, That the 81st General Convention commend the work and mission of the Office of Global Partnerships, specifically the faithful ministry of its partnership officers for Africa, Asia and the Pacific, Africa, Latin America and the Caribbean, and the Middle East; and be it further

Resolved, That General Convention strongly encourage all dioceses, parishes, individuals and organizations engaging in or considering global mission in these geographic areas to connect and consult with the Office of Global Partnerships (and the regional partnership officers) as partners in mission in order to more fully and deeply fulfill the mission of the Church to seek and serve Christ in all people and uphold and advocate for the values of God's liberating love throughout the world.

EXPLANATION

Many in The Episcopal Church engage in global mission, yet not all capitalize on the knowledge, expertise and missional relationships of the Office of Global Partnerships. The Standing Commission on World Mission calls on General Convention to commend the work of the Office of Global Partnerships and calls on those engaging in or considering global mission to utilize the vast network of connections and resources of the Office of Global Partnerships.

The vision of the Office of Global Partnerships is to build, nurture, and inspire relationships across The Episcopal Church, the Anglican Communion, and the global community. This office actively develops resources to strengthen and facilitate the global mission engagement of The Episcopal Church and highlights issues of international concern and, in cooperation with colleagues on the Presiding Bishop's staff, mobilizes engagement in these issues throughout The Episcopal Church, guided by the mission priorities adopted by General Convention, and the mission priorities of the Presiding Bishop of Evangelism, Reconciliation, and Care of Creation.

The area-specific partnership officers develop and nurture relationships with Anglican, ecumenical, and inter-religious partners in each region, and work closely with mission personnel officers to develop new missionary placements and opportunities, to support missionary discernment and training, and to ensure on-site pastoral support for missionaries in the field.

A089 Address Violence Against Women and Girls

Resolved, That the 81st General Convention affirm and uplift ongoing efforts to educate and empower advocacy among all the baptized in accordance with our scriptural, theological and moral understanding for gender equity, mutual respect and human dignity; and be it further

Resolved, That all the baptized use resources available to them, including *God's Justice: Theology and Gender Based Violence*, a resource produced by the Office of Gender Justice in the Anglican Communion, as a means of ongoing formation that fuels transformation; and be it further

Resolved, That Episcopal institutions and individuals participate in opportunities for activism and advocacy, including but not limited to, 16 Days of Activism sponsored by United Nations Convention on the Status of Women and Episcopal Relief and Development's 16 Days of Activism Toolkit.

EXPLANATION

The plague of gender-based violence is well documented but little attention and research has been committed to understanding its underlying causes, and the work of raising awareness remains critical. In seeking to know more about the complexities undergirding violence against women and girls, it is imperative that such information be shared with the wider Church, partnering with organizations who care for the rights of women and girls with a global scope. Increased understanding regarding the needs of women and girls can fuel motivation to participate in advocacy, therefore both must be encouraged in tandem.

The Standing Commission on World Mission uplifts The 16 Days of Activism and particularly the use of Episcopal Relief and Development's [16 Days of Activism Toolkit](#), as a tool for the development of new understandings as well as ongoing commitment to the work. Ongoing advocacy keeps the urgent need for women and girls in the forefront of hearts and minds, and uniting all across the breadth of humanity as beloved of God.

Support Documents:

[God's Justice: Theology and Gender Based Violence \(webpage\)](#)

[God's Justice: Theology and Gender Based Violence \(pdf\)](#)

[La Justicia de Dios: Teología y Violencia de Género \(pdf\)](#)

[16 Days of Activism Toolkit \(webpage\)](#)

Resolution A041 was co-sponsored with the Standing Commission on Ecumenical and Interreligious Relations

A041 Create a Task Force on The Episcopal Church-Anglican Communion Relationships

Resolved, That the 81st General Convention, pursuant to Joint Rule VII, create a task force on The Episcopal Church-Anglican Communion relationships, to work in collaboration with the Presiding Bishop, and whose mandate includes, but is not limited to, (1) conducting a study of issues impairing relationships of communion between The Episcopal Church and other Provinces of the Anglican

Communion, and the development of proposals for engaging constructively across differences; (2) proposing systematic ways for the Episcopal Church to respond to theological statements issued by the instruments of the Communion; (3) proposing a means of establishing clear guidance for representatives of The Episcopal Church to the triennial meetings of the Anglican Consultative Council; and (4) supporting the work of the Offices of Ministry Beyond the Episcopal Church as it relates to relationships with our Anglican Communion partners; and be it further

Resolved, That the task force begin its work no later than January 1, 2025, with the task force concluding its work at the conclusion of the 82nd General Convention, unless its mandate is extended by the 82nd Convention; and be it further

Resolved, That the task force report annually to the Executive Council’s Joint Standing Committee on Ministry Beyond the Episcopal Church and a report with recommendations to the 82nd General Convention; and be it further

Resolved, That the membership of this task force be appointed by the Presiding Bishop and the President of the House of Deputies and include up to three Bishops appointed by the Presiding Bishop; up to three Clergy and up to three Lay Persons appointed by the President of the House of Deputies; up to two members of the Standing Commission on World Mission (SCWM) appointed by the SCWM; up to two members of the Standing Commission on Ecumenical and Interreligious Relations (SCEIR), appointed by the SCEIR; and up to four representatives with expertise in the history and polity of the Anglican Communion; and be it further

Resolved, That the Presiding Bishop appoint a member of staff from the Presiding Bishop’s Office to serve as consultant to the task force; and be it further

Resolved, That \$30,000 be budgeted for the implementation of this resolution.

EXPLANATION

In the short time since the 80th General Convention concluded, significant developments have made clear the possibility of important changes in the relationships between Provinces of the Anglican Communion. Statements by leaders of some Anglican provinces that they no longer regard themselves as in communion with the Archbishop of Canterbury—a sine qua non of the bonds of Communion relationships—is one example.

The Episcopal Church should be a constructive voice in the conversations shaping the future of the Anglican Communion. Locating the responsibility for these issues within an Interim Body of the General Convention would be a clear signal to partner churches in the Communion of the seriousness with which our church will offer its voice in those conversations.

Joint resolution between the Standing Commission on World Mission and the Standing Commission on Ecumenical and Interreligious Relations

Memorial-001 Commend Unity Statement from World Council of Churches

Resolved, That the 81st General Convention commend the World Council of Church’s unity statement entitled, “Christ’s Love Moves the World to Reconciliation and Unity,” as a theological resource to combat “the many sins of profound injustice, such as casteism, racism, sexism, ageism, ableism, colonialism, economic exploitation, the unequal distribution of power and resources, and the corruption of our relationships with creation, alongside so many kinds of alienation;” and be it further

Resolved, That General Convention direct The Episcopal Church to engage in prayerful introspection as to how it has confronted those sins and to seek reconciliation if and when it has been complicit in them.

EXPLANATION

In a world where unity can seem far off, the Standing Commission on World Mission wishes to uplift the work of the World Council of Church’s unity statement as a tool to embrace a united voice against the sin of injustice in all its forms. By memorializing this body of work, The Episcopal Church can enter into shared discernment with Christians across the globe who seek to prayerfully engage the reconciling power of Christ through prayer, confession, atonement and renewed attention to right action.

Supplementary Materials

SUPPLEMENTAL REPORT FROM THE DISMANTLING COLONIALISM WORKING GROUP

The Colonial Mindset

Coloniality, or the Colonial Mindset, can be described as the living legacy of colonialism in the 21st century exemplified by the supremacy of Western/European mindsets, modes of thinking, cultural and economic systems, and bodies in former colonial states and their partners. Organizations, institutions, and governments that exhibit a colonial mindset will delegitimize native voices and communities in favor of external voices and cultures. This can be unintentional and accidental, and does not necessarily mean there was ill intent. This report intends to answer the question whether a colonial mindset exists and persists in the Episcopal Church. We, the Standing Commission for World Mission, believe that the Episcopal Church has to reckon with its dual identity as a former colony and a colonizing power. We also have served both as the official governmental representation in the U.S. colonies and the official colonizing religion of both US and UK colonies. As such, Our Missional institutions are replete with organizations, actors and systems that offer a preference for white, European and male voices in the allocation of funds, people and attention.

An Acknowledgement

One primary facet of South Africa's Truth and Reconciliation Commission (TRC) was acknowledging or recognizing the atrocities enacted upon victims and their suffering. According to Trudy Grover in an address entitled, "What is Acknowledgement and why is it important?" a central purpose of the TRC was to "acknowledge the tragedy of human suffering wherever it has occurred," whether victims were black or white, as the central purpose of the TRC to "restore the human and civil dignity of victims by granting them an opportunity to relate their accounts of the violations of which they are the victims and by recommending reparation measures in respect of those violations."

The mission of The Church, as outlined in The Book of Common Prayer (1979) is to reconcile people with God and with each other. To "reconcile" implies that there was a time of "conciliar" relationship between humanity and God and among human dynamics. While an origin story of the Christian narrative is the creation accounts in the book of Genesis where there is a description of such conciliarity between God and humanity and humanity with each other, this origin story also describes the alienation between humanity and God, humanity with the created order, and within the human family. In this sense, acknowledgment begins with recognizing the intention of creation as evinced by Genesis and the reality of the human saga.

For our work, we acknowledge and recognize that the intention of the created order and human relationships has not been realized. To the contrary, humanity's alienation from God, the created order, and each other has resulted in power dynamics that have manifested in the exertion of power by empires over colonized subjects. To acknowledge the reality of such power dynamics and the

resultant lack of conciliarity between empire and the colonized subject is the first step in “reconciliation.” Acknowledgment, for our purposes, entails a process of coming to terms with the definition of a “colonial mindset,” engaging in a systematic analysis through historical investigation as to whether such a mindset has existed, continues to exist, and be perpetuated by the church effected through historical survey and listening with humility; and, ultimately, based on such analysis making a collective determination as to recognize our complicity in the perpetuation of such a mindset. The result of such acknowledgment will, hopefully, take us to the path of reconciliation.

An Examination of Our History

A significant challenge for the Church, and indeed for all humanity, is what to do when we mess up. As a result, we would prefer to stay ignorant to our faults and failures, allowing ourselves to continue with the status quo. It is not that we don’t recognize we have done wrong, it is just that we would rather believe we can do better the next day without working through the issues of yesterday. However, the dangers of an unexamined church are just as great, if not greater, than an unexamined life. For this reason we offer this frame of the Ignatian Spiritual Examen to bring to light in a holistic way the reality of the history and current impacts of colonialism within the Episcopal Church.

Why a Spiritual Examen?

A Spiritual examen is a prayerful act. It begins with acknowledging and inviting God’s presence. As such we can recognize that God is with us in this journey even as it is painful. This matters because to delve into histories of racism, colonialism and white supremacy can leave a community feeling burned out, tired, depressed, wondering if it is even worth it to continue. The Examen invites us to consider the whole of the story - the good of the Church, the gifts the Holy Spirit has given us, even to admit some terrible realities. We can review the whole Christian story with love in our hearts, aspiring only to be better examples of Christ’s love going forward.

Become aware of God’s presence

The Lord said to Moses, ‘I will do the very thing that you have asked; for you have found favour in my sight, and I know you by name...I will make all my goodness pass before you, and will proclaim before you the name, “The Lord”; and I will be gracious to whom I will be gracious, and will show mercy on whom I will show mercy.

Exodus 33:17-19

The Episcopal Church emerged in the late 1700’s at the same time as what is now the United States of America. Our story is intertwined with the American story; a story of freedom, of life, liberty and the pursuit of happiness, of throwing off the yoke of oppression of a colonial power. So how can we, the Episcopal Church, possibly have any connection to colonialism? That is the Church of England’s problem! We can look back at our story and point out more than a few examples of God’s presence in our common life: a Church of presidents, senators and governors; founding universities, schools and other institutions of learning; a church whose leaders led the way in issues of justice and peace --

ordaining women, standing up for LGBT rights, fighting slavery, and advocating for peace. We should not deny the work of the spirit in the life of the Church. It continues today, as we lead the way in considering reparations for the legacy of slavery, in calling for inclusion, for healing and for hope. Just as God promised to be present with God's people in the desert and at Sinai, so God continues to be present with us.

Review the story with gratitude

Do not be afraid; I am the first and the last, and the living one. I was dead, and see, I am alive for ever and ever; and I have the keys of Death and of Hades. Now write what you have seen, what is, and what is to take place after this.

Revelation 1:17-19

But the Episcopal story is just as complicated as the American story. Yes, we believed in life, liberty and the pursuit of happiness, but we weren't convinced that applied to anyone outside of a very small number of people. We were both for and against slavery, both for and against the oppression of Native Americans and their relocation across this country. We were vigorous in our attempts to cast off the yoke of colonialism even as we became colonizers ourselves - first expanding west and south, establishing reservations and forcing adoption of new languages, cultures and attitudes; and then overseas in Puerto Rico, Cuba, Hispaniola, The Philippines, Guam, American Samoa, the Virgin Islands, all U.S. territories at one point or another, some still today.

Similarly the Episcopal Church has a history of colonialism and appropriation that continues to the present day. Province IX is the largest province in the Episcopal Church and is entirely made up of dioceses outside of the borders of the United States. It is only very recently that we have sought full inclusion of them in the life of the broader church, and many are still dependent on foreign donors and partner dioceses for financial sustainment. We are quick to point out that the Church in Uganda receives so much support from U.S. evangelicals, but we do not consider how the financial dependence of some of our own partners may limit or mute their voice in certain conversations.

While there are many examples of the continuing impact of colonialism, let us consider here the case of Liberia (see below), a U.S. colony born out of our own racism and desire to export the 'problem' of free blacks in America and how the Church continues to bear that legacy.

Pay attention to emotions, hurts, and wants

Out of the depths I cry to you, O Lord.

Lord, hear my voice!

Let your ears be attentive

to the voice of my supplications!

Psalm 130:1-2

The emotions that arise when we discuss colonialism, reparations and white supremacy are complex. For the dominant majority there is usually a feeling of shame, denial and hurt. For the minority, including those who have been impacted by the continuing legacy of these realities, there is a fear of rejection, of being denied, and of being hurt by people they love.

We must honor all of these feelings and emotions as being true, valid, and heard. For this reason Psalm 130 is a helpful reflection, a call from the depths knowing that God can heal this even as we don't quite know how that will happen.

If we allow these emotions to be heard, felt, expressed and honored, then a new emotion can emerge: hope. Hope that healing is possible, hope that a renewed approach to mission, evangelism and sharing the gospel can emerge

Choose one aspect of the story and pray from it - the Story of Liberia

The Country of Liberia came to be in the 1800's, as the American Colonization Society (ACS) began sending freed blacks back to Africa because most white Americans did not believe that blacks could integrate with white society. (see Menja, Olu *In The Beginning*) This Christian organization, led predominantly by southern Episcopalian and other protestant leaders, raised considerable sums of money to move tens of thousands of African-Americans from the U.S. back to Liberia, with significant questions still today about the freedom of individuals to choose whether or not they were 'repatriated'.

The Episcopal Church in Liberia has similar parallels. With both white and American-born Black leaders, it retained most of the traditions of the Episcopal Church in the United States, as well as its structures, but also struggled with its identity (See Tishken, Joel *Neither Anglican nor Ethiopian*). These patterns were reflected back on churches and institutions of the United States. When the Seminary Chapel burned at Virginia Theological Seminary in 2012, one of the most mourned (and valuable) pieces of the church that was lost was the altar rail, made of Liberian Mahogany and gifted to the Seminary by missionaries sent out from VTS. There are signs and symbols of this colonial legacy all over the Episcopal Church. All we have to do is look.

Look toward what is next

We will explore 'What is next' in the following section on healing and hope.

Towards Healing and Hope:

We contend that the healing journey requires courage, compassion, and creating space for God's grace to enter. The first step in "reconciliation" is acknowledging the reality of such power dynamics and the resultant lack of conciliarity between the empire and the colonized subject. The final stage of this journey is a sense of healing and justice. In this section, we wish to offer some suggestions on how we, as a Church, can offer this type of healing.

The Community of the Cross of Nails at Coventry Cathedral (CCN) has developed a helpful approach to transforming conflict, similar to healing and reconciliation. This journey is not straightforward but requires effort on multiple fronts and sometimes simultaneously. CCN proposes six commitments that must be honored if healing, reconciliation, and the presence of Beloved Community could be met. Those conditions are:

- ~ A Commitment to Research the Truth and to Acknowledge It
- ~ A Commitment to Building Relationship with The Church as a Servant.
- ~ A Commitment to Risk, to Vulnerability.
- ~ A Commitment to the Process of Relief, Repentance, and Repair.
- ~ A Commitment to the Process Reconciliation as a Process
- ~ A Commitment to Resource this Process.

We shall briefly discuss each area in the next section.

A Commitment to Research that Acknowledges the Truth

*The Biblical narrative throughout the Old and New testaments points us to honestly examine ourselves, not with shame or hubris, but with humility and hope. The prophet Ezekiel asks that after Israel acknowledges her sins, the existential inquiry is, “How then shall we live”?*¹

South Africa’s Truth & Reconciliation Commission sought to lay bare the truth of the nation’s apartheid-era human rights abuses in a way that could be categorized as restorative justice. The country’s leaders and the 14 commissioners said they wanted a system that was neither amnesia nor Nuremberg. Any fair study of America’s approach to our history reveals that America tends to choose a historical amnesia, and only sporadically will America examine her history. As the largest nation in the Episcopal Church and as a one-time colonial power, this reluctance for self-examination is tragic.

This tendency for denial is reflected in a book called **How to Hide an Empire** by Daniel Immerwahr, which is about the subtlety and power of American colonialism and neo-colonialism.² As journalist Ray Suarez said, America was an empire, but it never admitted it. In places like countries such as Cuba, Puerto Rico, Hawaii and elsewhere, the Episcopal Church was present. Thus, our Church’s missionary growth is inextricably linked to colonialism, and so we are entangled with the powers and principalities of empire. The presence of White Supremacy in our Church reflects the same struggle. Yale theologian Willie Jennings details that from the inception of the so-called “Age of Discovery,” the Western Church (Roman Catholic and Protestant, Portuguese, the Spanish, and then the English, the French and the

Italian) was deeply embedded in the colonial enterprise, and twin–White Supremacy. This legacy has remained in the DNA of our Church as in the rest of American society.³

This reality is part of the theme the writer Isabel Wilkerson describes as the origins of our discontents; like someone who has inherited an old house, it is beautiful, classic, and full of character. However, the house has a foundational flaw, a miscalculation when the foundation was laid, and thus the structure of the frame was compromised, and the house has lived with it for centuries. As inheritors of the house, we may recognize the building's positive qualities. With old houses people often talk about the good bones of a house. Yet the good bones of an old house can obscure its foundational defects. Yet, even with such a house, we can do something. When one inherits or buys a house with defects, it doesn't do much good to blame or shame someone. But we must do something about the house. Our call as Christians is to work toward deconstructing and reconstructing a new foundation and frame.⁴

Theologian Michael Battle, foremost chronicler of the theology of Archbishop Desmond Tutu, in his spiritual autobiography of the late prelate, writes of the need to examine conscience, repentance, and repair. Civil rights lawyer Brian Stevenson, founder of the Equal Justice Initiative, created The Legacy Museum and the National Memorial to Justice and Peace to confront America's past. Stevenson was inspired to do this after he visited Germany and South Africa to learn how those nations have chosen to confront the past.

We begin this acknowledgment process with our theology and how our theology is shaped through our liturgy. Our Anglican liturgy is the scaffolding that undergirds and centers our theology. The hinge of our liturgy that moves us from the Liturgy of the Word to the Liturgy of the Eucharist is the Creed, the Prayers of the People, the Confession, the Absolution, and the Peace.⁵ Thus, at the heart of our liturgy we acknowledge our sins and pledge to be transformed into new life. These ritual steps point us toward our life in Christ, the church as a community, and our liturgical life. This is a move between memory and hope.

A Commitment to Building Relationships ~ Where The Church Must Be A Servant

Part of the Mission of God's Church is to participate in God's Mission of building God's Beloved Community. The term "beloved community" was first expressed in the philosophy of non-violence of the Rev. Dr. Martin Luther King. One of King's principles of nonviolence was to seek friendship and understanding on a communal, national, and global basis. For Dr. King, the outcome of nonviolence is the creation of the Beloved Community, redemption, and reconciliation. One of King's most famous quotes was delivered from the pulpit of The Cathedral of SS Peter & Paul for the final time (Washington National Cathedral) on Palm Sunday, four days before his assassination. King's sermon was based on the themes of his final book, **Where Do We Go from Here: Chaos or Community?** The book and the sermon were America's prophet's urgent plea for his nation and the world to move toward justice. While he shaped his message for a non-sectarian world, his theology was founded on the belief that justice will eventually win and that God is a God of justice. King was fond of paraphrasing by the 19th-

century abolitionist minister Theodore Parker, who said, “The arc of the moral universe is long, but it bends toward justice.” His final Sunday sermon from the Cathedral’s Canterbury Pulpit reminded worshippers that “We are all inextricably linked in a mutual relationship of mutuality and interdependence”.⁶

Dr. King’s theme of justice, interdependence, and reconciliation has been rejuvenated by our Presiding Bishop, Michael Curry, who often says, “we don’t learn not only the language of love but also learn to be in a relationship.” The goal of healing is real intimacy and real community, and it was often blunted. We have inherited this situation in the church and society. And we must reclaim that sense of communion and intimacy as human beings.

A Commitment to Risk ~ Trust ~ Vulnerability

Powers and Principalities

Holy scripture tells us that part of the struggle is what Paul talked about in the church, to the church in Ephesians, “For our struggle is not against enemies of blood and flesh, but against the rulers, against the authorities, against the cosmic powers of this present darkness, against the spiritual forces of evil in the heavenly places.”⁷ One of the great principalities is the problem of race, and colonialism is deeply intertwined with this. This challenge requires that parties be vulnerable as we finally grapple with our tragic and painful history.

A Commitment to the Process of Relief, Repentance, and Repair

The Prophet Isaiah says, “Your ancient new one shall be rebuilt, and you shall raise the foundations of many generations. You shall be called the repairer of the breach, the restorer of streets to live in”.

We shall be called repairers of the breach. We believe that as a Church engaged in mission today, whether domestically or globally, we must be repairers of the breach caused by history’s wrenching sins, such as colonialism and White Supremacy. Paul (and the Pauline epistles) conveyed this work of reconciliation to nearly all the communities who heard the Word of God, from a man who was transformed from a persecutor and executioner to an apostle and martyr for Jesus. This is part of the work of participating in The Realm of God. This work will require faithful proclamation and steadfast action.

A Commitment to Reconciliation ~ The Goal of The Process Which is to Transform the Wounds and the Conflict

*“in your hearts sanctify Christ as Lord. Always be ready to make your defense to anyone who demands from you an account of the hope that is in you”.*⁸

Hope. At our best, we are prisoners of that hope Paul talks about. The Biblical hope can be the engine that leads to transformation; sometimes this transformation can seem miraculous. In 1994, the New South Africa was an example of a nation being transformed. Many White people who remained after

the end of apartheid were committed to confronting their collaboration with the past. They talk about their history in a way that makes many Americans, including our leaders, seem inarticulate. In America, we have made tremendous strides in racial progress and begun to grapple with our colonial past as perpetrators and victims. Yet our historical penchant leads to American reluctance or resistance to confront the deeper and systemic forces. One of the Commission members recalls that a South African journalist told him she was raised in the 1970s and 1980s when the American narrative told around the world was that America had solved her racial problems.

A Commitment to Resource the Reconciliation Process

Lila Watson, an indigenous Australian, gave a speech in 1976 at an Aboriginal Conference in Australia. The community she represented is considered poor, disenfranchised, and displaced. She has been attributed as the author, but Lila has always been clear that the quote was developed collectively by a group of Aboriginal women of whom she was a member. In 1985 she spoke at a United Nations Decade for Women Conference in Nairobi, Kenya. In such gatherings, several White Westerners often represent the "Lady Bountiful tradition" of paternalistic foreign development aid. Lila's quote invited the listeners to perceive a new way of liberation and support.

“If you have come here to help me, you are wasting your time. But if you have come because your liberation is bound up with mine, then let us work together”.⁹

The Australian Aboriginal quote is an apt analogy of how the Christian Mission needs to be. Financial commitment is needed, but not out of a sense of guilt or noblesse oblige. What is required for appropriate resourcing is to do so with a commitment to mutuality, relationship, respect, and justice.

RECOMMENDED RESOURCES FROM THE RISING RELIGIOUS NATIONALISM WORKING GROUP

ARTICLE LINKS

Christian Nationalism's Popularity Should be a Wakeup Call, Time Magazine, January 28, 2023, LINK - <https://time.com/6250769/christian-nationalism-popularity-wake-up-call/>

Any Religion Allied with Nationalism is Dangerous, U.S. Catholic, April 12, 2023, LINK - <https://uscatholic.org/articles/202304/any-religion-allied-with-nationalism-is-dangerous/>

Christian Nationalists Have Provoked a Pluralist, Religion News, April 21, 2023, LINK - <https://religionnews.com/2023/04/21/christian-nationalists-have-provoked-a-pluralist-resistance/>

Religious Nationalism and Pope Francis' Culture of Encounter, La Civita Catolica, January 23, 2023, LINK - <https://www.laciviltacattolica.com/religious-nationalism-and-pope-francis-culture-of-encounter/>

How the Politics of Hate Unifies South Asia, The Write, January 29, 2023, LINK - <https://www.laciviltacattolica.com/religious-nationalism-and-pope-francis-culture-of-encounter/>

'January 6 Was Not an Aberration': The Role of White Nationalism, Christian Science Monitor, March 7, 2023, LINK - <https://www.csmonitor.com/Books/Book-Reviews/2023/0307/Tracing-the-evangelical-roots-of-white-nationalism>

A Word of Caution for Israel and the USA, Israel Today, April 25, 2023, LINK - <https://www.israeltoday.co.il/read/a-word-of-caution-for-israel-and-the-usa/>

BOOKS

Ahmed, I. (2005). The politics of group rights: the state and multiculturalism. University Press of America.

INTERIM BODY TO OVERSEE THE CONTINUING DEVELOPMENT OF ANTI-HARASSMENT BEST PRACTICES, MODEL POLICY EXAMPLES AND VARIED TRAINING MATERIALS

Members

Ms. Laura Russell, Chair	Newark, II	2024
The Rev. Gwen Fry, Vice Chair	Arkansas, VII	2024
Ms. Judith Andrews, Secretary	Olympia, VIII	2024
The Ven. Laurie Brock	Lexington, IV	2024
The Rev. Canon Anna Carmichael	San Joaquin, VIII	2024
La Revda. Ivette Linares	Puerto Rico, II	2024
Ms. Katie Sherrod	Texas, VII	2024
The Rev. Gavin Shumate	Oregon, VIII	2024
The Rt. Rev. Martha E. Stebbins	Montana, VI	2024
Mr. Paul Stephens		2024
The Rt. Rev. Megan Traquair	Northern California, VIII	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024

Representation at General Convention

Deputy Laurie Brock is authorized to receive non-substantive amendments to this Report at the General Convention.

Acknowledgements

The Task Force gratefully acknowledges the work of the Interim Body that reported to the 80th General Convention, the Task Force to Develop Model Sexual Harassment Policies & Safe Church Training.

Mandate

2022 - A066 Establish Interim Body to Oversee the Continuing Development of Anti-Harassment Best Practices, Model Policy Examples and Varied Training Materials

Resolved, That the 80th General Convention direct the Executive Council to establish a Task Force pursuant to Canon I.1.2.0 to oversee the continuing development and implementation of anti-harassment best practices, model policy examples, and varied training materials. The Task Force shall be comprised of at least nine (9) people who reflect the diversity of The Episcopal Church, to the degree possible, while also including those experienced in adult education, the prevention of sexual abuse, the prevention of employment discrimination, Human Resources, working with Title IV (including chancellors and Intake Officers), and working with survivors of abuse (including Victim Advocates); membership should also include at least three (3) persons from the Task Force to Develop Model Sexual Harassment Policies and Safe Church Training appointed in 2018; and be it further

Resolved, That the Task Force shall seek and consider feedback from local use and adaptation of the original model policy, from as diverse a group of communities within the Church as possible. The goal of the Task Force shall be to refine the Best Practices Guide, to gather samples of policies and practices in actual use across the Church, and to develop additional model policies for use in the broadest spectrum of church locations and extra-parochial communities; and be it further

Resolved, That the Church Pension Group be asked to collaborate with this effort and to appoint a member to serve on the Task Force; and be it further

Resolved, That the 80th General Convention of commit itself to the financial support of the continuing development of these materials, and training, as an element of its efforts to advance clergy wellness and reduce liability, as well as to the ability of all members of the Church to live into the Baptismal Covenant, seeking and serving Christ in all persons; and be it further

Resolved, That \$75,000 be budgeted for the work of the Task Force over the next triennium.

Summary of Work

We began with an expansive conversation of harassment. As both our mandate and our proposed resolutions state, we were to continue developing anti-harassment best practices for the entire Church and explore how harassment and safety issues within our Church could be handled so all are able to participate in the life and work of the Church.

As members of one body in Christ, as people called to minister in God's name, we should seek to nurture interpersonal relationships that are healthy and life-giving for all. We hope and perhaps even expect that the Church should be a place where we can trust one another and where God's warm embrace feels comfortably close at hand. As our discussions unfolded, we continued to recount how the Church has fallen short of that goal. Many of the Church's members, lay and ordained, experience various forms of harassment that interfere with their ability to live fully into their vocations. When any member harasses another, they abuse the trust of the whole Body, violate the baptismal covenant, and act contrary to Christian character. Harassment (whether by lay or ordained members of the Body) must be taken seriously by the whole Church, because when any member harms another, the whole Body is harmed.

Using this lens, we began to focus on not only on finalizing the Anti-Harassment Best Practices and Model policy, but also other pressing issues within the Church that create unsafe environments and allow those who have harassed to hide their behavior and continue their abuse.

Anti-Harassment Best Practices and Model Policy

We reviewed the prior Task Force to Develop Model Sexual Harassment Policies & Safe Church Training's work, which was submitted to the 80th General Convention. Their work included the Model Anti-Harassment Policy summary document and Best Practices Guide. The work of the prior task force was very thorough. It was well-thought out and detailed. The guide that was created, which had begun in prior to that Task Force, created a clear document for handling of harassment issues. During our time together, we reviewed this document, reflected on its need, and refined it, seeking comment from various sources. We discussed the guide with Chancellors and key officers. We sought input not only as to content, but usability and wording. As one of our members was a liaison with Church Pension Group, the guide was also reviewed by them. After taking all comments, we feel the guide in its current form is ready to be adopted and used by congregations, and those in other settings.

We also spoke with the organization that currently handles our Safe Church Training. Should the guide be approved, they are prepared to assist us in creating additional modules to assist in the implementation of this guide. These modules would be added to our Safe Church Training. They

would amplify the Best Practices Guide, explaining key parts. The modules would work hand in hand with the Guide. Therefore, we have put forth a resolution to approve the guide and work to create additional modules to train on Anti-Harassment Best Practices.

Safety/Harassment Concerns within our Church

There are times when the Church must come together and recognize our practices do not make it safe for all to participate in the life and work of the Church. Practices which exclude some or create secrecy around harassing behavior should be called out and not tolerated. Recognizing some of the Church's current practices allow this behavior to continue, we sought to not only call attention to it, but to seek change.

Attending General Convention

Everyone who seeks to attend General Convention should be welcome. No one should be unable to attend General Convention because they feel unsafe, fearful or they are not welcome. The Episcopal Church in its Canons (III.1.2) states that no person may be denied access to the discernment process or to any process for the employment, licensing, calling or deployment for any ministry, lay or ordained, in the Church because of race, color, ethnic origin, immigration status, national origin, sex, marital or family status (including pregnancy and child care plans), sexual orientation, gender identity and expression, disabilities or age, except as otherwise provided by the Canons. Though this Canon discusses access to the ordination process, one can apply this to any ministry of the Church. Governance is a ministry of the Church. To deny someone the right to exercise their ministry is against our Canons.

In choosing locations for future General Conventions, one should take these Canons to heart. Locations that make LGBTQ+ individuals afraid to attend due to discriminatory state laws should not be locations for future General Conventions. Locations that take reproductive rights and choices away from individuals should also not be locations for future General Conventions. No one should feel unsafe to attend General Convention. No one should have to hide who they are to be able to participate in the life of the Church. No one should have to be concerned that if they had a medical emergency, they would not receive the treatment they need to survive.

With this in mind, we, as the Task Force, wrote to the Joint Standing Committee on Planning and Arrangements, requesting they consider these concerns. We asked that they not put forth locations which may be unsafe to members of The Episcopal Church. We wrote, "To allow the meeting of General Convention to be hosted in dangerous areas, and to support cities financially that are unsafe or unwelcoming to the diversity of our deputies, is at our own peril. We will inevitably exclude the very voices that we seek to lift up, if deputies feel unsafe to stand for election due to the location of the meeting of General Convention." It is our sincere hope that the

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Joint Standing Committee review their future locations for General Convention, with an eye to making sure all are safe when attending.

Requesting the House of Bishops Articulate a Stand on Certain Civil Disobedience

In the current legal landscape, several states have passed laws that impose criminal liability on people who assist a person discerning whether to have an abortion, attend to a person considering their choices regarding gender expression, provide access to various books banned by certain jurisdictions, and provide public space for artistic expression in Drag Shows.

These are a small sample of the current acts that are now criminal in many of the legal jurisdictions of our Church. Many of these laws enter the historically protected space of pastoral confidentiality and counseling that occurs between clergy and their parishioners.

Clergy who offers support, which is averse to these laws, need to know that they will not be subject to Clergy discipline. They need to know that they can engage in pastoral care and ministry with people seeking reproductive health care or gender affirming care, including any and all support of LGBTQ+ communities that may subsequently be criminal, will be supported by their Bishop, and not subject to discipline. Bishops need to affirm their support of this form of civil disobedience.

To this end, just prior to the next House of Bishops meeting, the Task Force is sending a letter requesting the House of Bishops consider a statement affirming their opposition to laws that stand in opposition to the right of people to make reproductive decisions and the right for people to make decisions about their gender expression and request a clear statement that no clergy will be subject to a Title IV offense if they are engaging in pastoral care, ministry or civil disobedience to those actions which are criminalized by these laws.

Canonical Changes to Create Transparency within our Church

During this biennium, there was much discussion of the Canons of the Episcopal Church. Each of us also brought our experiences with the Canons to our meetings. One word continued to be a thread through our discussions-transparency. The Church needs to be transparent. Without transparency, we keep harassment festering, fail to hold clergy accountable for their actions, and hurt the body of the Church. For harassers to stop, they must be brought forth, and held accountable. Some changes are necessary to bring forth transparency in our Church. We propose several resolutions which will make harassing behavior transparent.

First, we recommend the use of Non-Disclosure Agreements (NDA) when there is a dissolution of an employment relationship within the Church be carefully studied. NDAs should not be used to conceal inappropriate behavior. Clergy whose call is involuntarily terminated, once an NDA is

signed, can simply not answer any questions regarding the termination. They can be used to protect harassers and abusers. Though an NDA can be useful when protecting a victim, there is no place in the Church for such agreements that protect abusers and hide inappropriate behavior, which do not lead to transparency or accountability. We call for a study to limit the use of NDAs in our Church.

Next, we recommend limiting the power of the Church Attorney in Title IV clergy discipline proceedings. Currently, the Church Attorney may enter into an Accord after a matter is referred to the Hearing Panel. This effectively gives the Church Attorney the ability to end a case without any consultation from the Reference Panel or the Disciplinary Board. That power, without any check or balance, allows one person to completely change the disciplinary process. There is no transparency in ending a disciplinary proceeding in this way. We recommend that this power be checked by the Hearing Panel, who should be required to consent to the outcome.

Our final recommendation is the creation of a database of accords, decisions, pastoral directions and pastoral responses issued to clergy involved in clergy disciplinary proceedings. Currently, the General Convention authorized a database similar to this in 2018. As of this writing, no database can be found by this Task Force that is complete. Furthermore, that resolution did not authorize the names of the respondents to be released. We are seeking a database, which will be available to a limited group, which has the respondents' names and offenses. The database will allow for transparency. Clergy who has be subject to discipline will be required to explain the proceeding, and the outcome to Bishops and Transition Officers, thus allowing full disclosure when hiring.

Proposed Resolutions

A023 Authorize and Support the use of the Best Practices Guide and Model Anti-Harassment Policy

Resolved, That the 81st General Convention adopt the Best Practices Guide and Model Anti-Harassment Policy available as a support document on this resolution or viewable as a supplementary material in the Report to the 81st General Convention of the Interim Body to Oversee the Continuing Development of Anti-Harassment Best Practices, Model Policy Examples and Varied Training Materials; and be it further

Resolved, That the 81st General Convention direct the Executive Council to provide for the support and encouragement of the use and adaptation of the Model Policy to Prevent Harassment by dioceses, congregations, and affiliated institutions; and be it further

Resolved, That the Best Practices Guide and Model Policy be hosted on the Domestic and Foreign Missionary Society [DFMS] Safe Church website. The website shall be adapted and monitored so that it becomes a site for on-going creation and curation of feedback from experimental use and local adaptation of the Best Practices Guide and Model Policy throughout TEC during the next triennium; and be it further

Resolved, That dioceses, congregations, and affiliated institutions report their feedback and recommendations for further development on the basis of their practice to the DFMS hosted Safe Church website; and be it further

Resolved, That the 81st General Convention of commit itself to the financial support of the continuing development of these materials, and training, as an element of its efforts to advance clergy wellness and reduce liability, as well as to the ability of all members of the Church to live into the Baptismal Covenant, seeking and serving Christ in all persons; and be it further

Resolved, That \$75,000 be budgeted for this work over the next triennium.

EXPLANATION

The Best Practices Guide and Model Policy has been reviewed by multiple General Conventions. It needs to be promulgated and utilized across the Episcopal Church. Therefore, it needs to be easily accessible to all members and institutions of The Episcopal Church. The DFMS Safe Church website already provides access to the Model Policies for the Protection of Children and Youth and the Model Policies for the Protection of Vulnerable Adults and is therefore the ideal location for the

Anti-Harassment Best Practices Guide and Model Policy documents. Because the needs and the practices of the Church are so diverse with respect to definitions of harassment, and its reduction and elimination, the continuing collection of data and stories is vital to the development of standardized, yet helpfully varied, training.

The Best Practices Guide and Model Anti-Harassment Policy is available as a support document on this resolution. It is also available as a supplemental material in the report to the 81st General Convention of the Interim Body to Oversee Anti-Harassment Best Practices, Model Policy Best Practices and Varied Training Materials.

Support Document:

[Best Practices Guide and Model Anti-Harassment Policy](#)

A024 Study the Use of Non-Disclosure Agreements

Resolved, That the 81st General Convention recognizes the use and presence of Non-Disclosure Agreements, confidentiality provisions, and other contractual agreements between parties as legal and binding resolutions to civil matters and disciplinary within the general Church; and be it further,

Resolved, That this convention acknowledge such legal agreements are useful apparatuses for resolutions of misconduct actions and other actions involving bishops, clergy, and laity, including but not limited to actions initiated through the procedures in Title IV, especially when the Complainant and/or Injured Person is a minor or desires the binding confidentiality and terms a Non-Disclosure Agreement may provide; and be it further,

Resolved, That this convention recognizes Non-Disclosure Agreements have also been historically used to protect and hide evidence of patterns of predatory behavior, misconduct, and other serious offenses from being known by applicable church individuals and bodies, from ensuring that Complainants and/or Injured Persons have appropriate opportunities for healing, and that unduly burden those harmed by misconduct; and be it further,

Resolved, That past Conventions have directed the Standing Commission on Structure, Governance, Constitution and Canons to study the use of Non-Disclosure Agreements, confidentiality provisions, and other contractual agreements between parties used to resolve civil matters, other disciplinary issues, and matters begun through Title IV proceedings; to discover the frequency of use of these documents to resolve civil and Title IV matters of misconduct in the Church; the general nature of these documents and provisions; the impact of these documents

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on Complainants, Injured Persons, and victims of misconduct, as well as the impact on Respondents, especially when the impact of these agreements has been to impede or obstruct the process of restoration, healing, and reconciliation, to which we are called as the Body of Christ; and be it further,

Resolved, That this convention reiterates the ongoing use and misuse of nondisclosure agreements within the church and directs the appropriate commission or body to study the use of these agreements and similar documents and report back to Executive Council with the statistical information and impact of the use of these and similar documents with recommendations for use of said Non-Disclosure Agreements and similar documents for use in the church; and be it further,

Resolved, That these findings shall be utilized by the Executive Council to make appropriate recommendations to amendments to Title IV presented to the subsequent General Convention and to develop guidelines for dioceses and chancellors for use of Non-Disclosure Agreements, confidentiality provisions, and other contractual agreements between parties documents to be distributed no later than December 1, 2026.

Resolved, That until a policy regarding their use is implemented by the appropriate ecclesiastical bodies, Non-Disclosure Agreements shall be used sparingly in the resolution of actions, and that they are not to be used to protect the individual or organization from the notoriety or information of misconduct, transgression, or wrongdoing, but instead should be used at the request of the Complainant and/or Injured Person as a part of restoration, healing, and reconciliation.

EXPLANATION

Non-Disclosure agreements, or NDAs, have been used to create a legal ability to fail to report or disclose improper behavior. It is understandable that they are used, as they can limit the financial impacts on a diocese or congregation. They also can protect injured persons, creating confidentiality for the victim. But they also limit transparency and can create a cycle where inappropriate behavior is not addressed, but merely passed from one congregation to the next. This canon would create a study of the use of Non-Disclosure Agreements within the Church. It would not prohibit Non-Disclosure Agreements, but would allow for a interim body to study their use, report to Executive Council and then ask Executive Council to recommend amendments to our Canons regarding their use, as well as guidelines for their use.

A025 Amending Canon IV.13.4

Resolved, That the 81st General Convention amend Canon IV. 13. 4 as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Sec. 4. If at any time after a matter has been referred to a Hearing Panel an Accord is reached that ends the proceedings before the Hearing Panel issues an Order, the Accord must be consented to by the Hearing Panel, and if approved, the Bishop Diocesan shall make the Notice of Accord available to the Church and Church media as provided in Sec. 3 as well as to the Hearing Panel.

<Proposed amended resolution text showing exact changes being made:>

Sec. 4. If at any time after a matter has been referred to a Hearing Panel an Accord is reached that ends the proceedings before the Hearing Panel issues an Order, *the Accord must be consented to by the Hearing Panel, and if approved,* the Bishop Diocesan shall make the Notice of Accord available to the Church and Church media as provided in Sec. 3 as well as to the Hearing Panel.

EXPLANATION

Currently the Church Attorney has the ability to enter into an Accord, which could conclude a clergy discipline matter, without consultation from the Disciplinary Board. This gives the Church Attorney the power to effectively decide how the matter should end, without input from the Reference Panel or the Disciplinary Board. A matter before a Hearing Panel has been reviewed by the Reference Panel and the Disciplinary Board, yet one person can then choose what the outcome should be. This power should be checked. As the matter has already been referred to the Hearing Panel, it would make sense for the Hearing Panel to have the ability to approve the Accord, as a check on the power of the Church Attorney.

A026 Establishing a Database for Title IV Outcomes on the Office of Transitional Ministry Profiles of Clergy

Resolved, That the 81st General Convention authorize the establishment of a Title IV data base on the Office of Transitional Ministry (OTM) website, of which will hold all pastoral responses, pastoral directions, Accords, and decisions regarding clergy discipline, for the purpose of transparency, integrity, and accountability of all clergy search processes in The Episcopal Church; and be it further

Resolved, that each Diocese shall send all mentioned materials to the Office of Transitional Ministry within thirty days of their becoming effective; and be it further

Resolved, That the OTM staff be charged with the responsibility of data entry and updates of any materials.

EXPLANATION

It will make the church a safer place for everyone. It will also enable the search processes of the church at all levels to be more transparent, honest, and accountable to its members when actively searching for new clergy. This best practice will also remove some of the pressure of diocesan transition officers and bishops who frequently are tasked with learning of multiple clergy candidates in a short amount of time.

Supplemental Materials

Best Practices Guide and Model Anti-Harassment Policy (see next page)

Best Practices Guide and Model Anti-Harassment Policy

Introduction

We are putting no obstacle in anyone's way, so that no fault may be found with our ministry, but as servants of God we have commended ourselves in every way.

2 Corinthians 6:3-4

We all are called for service to witness in God's name.
Our ministries are different, our purpose is the same:
to touch the lives of others by God's surprising grace,
so people of all nations may feel God's warm embrace.

"We all are one in mission", Wonder, Love, and Praise 779

From the beginning, human beings were meant for connection and relationship. "It's not good that the human is alone," God said, and made a helper and partner.¹ As members of one body in Christ, as people called to minister in God's name, we seek to nurture interpersonal relationships that are healthy and life-giving for all. We hope and perhaps even expect that the Church should be a place where we can trust one another and where God's warm embrace feels comfortably close at hand.

Yet too often, the Church has fallen far short of that goal. The ways in which the Church has fallen short were detailed by the House of Deputies Special Committee on Harassment and Exploitation in 2018. They confirmed that many of the Church's members, lay and ordained, experience various forms of harassment that interfere with their ability to live fully into their vocations or roles and to participate in the life and work of the Church.² When any member harasses another, they abuse the trust of the whole Body, violate the baptismal covenant, and act contrary to Christian character. Harassment (whether by lay or ordained members of

¹ Genesis 1:18, Common English Bible.

² Members of the committee gathered data informally from lay and ordained members throughout the Church, including their own experiences of systemic sexism, misogyny, misuse of power, sexual harassment, exploitation, and violence in the Church and other employment and institutional settings). Although other denominations, including the United Methodist Church, have gathered official data on these issues within their denomination, and these reports informed the special committee's work, TEC has not conducted a formal, denomination-wide study. A report of the special committee's work was not included in the Blue Book for the 79th General Convention, but may be found on-line at <https://extranet.generalconvention.org/staff/files/download/22107>. In addition, a summary of the committee's work and resulting resolutions may be found on-line at <https://houseofdeputies.org/2018/10/06/special-committee-on-sexual-harassment-and-exploitation-legislation/>

the Body) must be taken seriously by the whole Church, because when any member harms another, the whole Body is harmed.

Harassment is unwelcome conduct toward an individual on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, national origin, age, weight, height, disability, military status, family status, marital status, or any legally protected status, any time the conduct creates an intimidating, hostile, or offensive environment. Examples of harassment that may violate this policy include, but are not limited to:³

- Oral, written, or electronic communications that contain slurs, negative stereotyping, offensive jokes, insults, or threats. This includes comments or jokes that are dismissive of human dignity or targeted at individuals or groups based on attributes listed above.
- Nonverbal conduct, such as leering and giving inappropriate gifts.
- Physical conduct, such as assault or unwanted touching.
- Visual images, such as derogatory or offensive pictures, cartoons, drawings or gestures. Such prohibited images include those in hard copy or electronic form.
- Expressed or implied demands for favors in exchange for some benefit (e.g., a promotion, a leadership role) or to avoid some detriment (e.g., termination, removed financial support for a pet project)

Taking harassment seriously includes taking seriously the differences of power resulting from distinctions in order and role, as well as power differentials that also exist outside the Church.⁴ It includes doing all we can to prevent harassment from happening as well as providing structures for responding appropriately to stop harassment; for redressing harm caused by harassment to the harassed, the harasser, and the community; and for exploring how and when reconciliation may be possible. Such responses will and should vary depending on the circumstances.

This document is for you if you have ever witnessed or experienced harassment in the Church and wondered how you can help prevent it from happening to someone else. This document is for you if you have been accused of harassment in the past and wondered how you can avoid similar situations in the future. This document is for you if you work in shared spaces with representatives or ministries of the Episcopal Church and want to build a culture of mutual respect.

³ A more detailed list of example behaviors is included in Appendix A.

⁴ These may include but are not limited to ability, gender, race, wealth and status, relative size, familiarity with the space or community, or education level.

But this document is especially for you if you are a lay or ordained leader of any sort in any Episcopal church, community, or other context. When we accept leadership roles, we accept heightened responsibility for helping to set expectations in our context, as well as for noticing and redirecting harassing behavior in others. Leaders also bear a particular responsibility for understanding how their own behavior may impact others (including the reality that their behavior may land differently simply because they are a leader). Your intention is significantly less important than your impact.

This document is designed to assist you in preventing and responding to harassment in your context. It serves as a statement and a guide for the Episcopal Church, to help ensure that the behavior of church members (individually and corporately) witnesses to the transforming power of God's love. It offers a set of best practices for developing consistent methods of preventing, identifying, and compassionately responding to the harassment we know is taking place in the Church. The practices outlined here are designed to govern all members of the Church, lay and ordained; employees of churches, broader Church or church-related entities such as camp & conference centers, schools, etc.; volunteers; service providers; and any others acting on church/institutional property or participating in church-sponsored events.

This document starts from the perspective of protecting those most vulnerable, because by doing so, we increase the safety of and support for all persons. Anyone may be harassed and anyone may harass another person; however, women; transgender, nonbinary and gender nonconforming persons; children; the elderly; Indigenous people, and/or People of Color; neuro-divergent people; and persons with mental and/or physical disabilities are often at greater risk of harassment, including sexual harassment and assault.

In most cases, these practices and the model policy they guide focus on forms of harassment other than physical or sexual abuse and/or assault, although some cases of harassment may ultimately escalate to become such cases. While there may be a variety of responses to harassment which appropriately redress harm and maintain community bonds, there is never any excuse for, nor should there be toleration for, abuse or assault.⁵

As a Church body, we have learned through hard experience that ignoring harassment within the body of Christ will not make it go away - it simply reduces the Church's capacity to witness to God's transforming love and gives permission for continuing and escalating harassment. Policies and practices are not a magic wand; they cannot substitute for an authentic culture

⁵ Whatever other actions the church takes in such cases, the church should always work primarily to assure safety for those who have been assaulted. Church members and officials should cooperate as needed with secular legal authorities to take appropriate action against the assault perpetrator while continuing to provide pastoral and community support for the victim. In situations in which the church also engages in its own disciplinary processes, these should not be used to hinder or interfere with secular criminal processes.

of mutual care for one another, nor for the caring responses needed when harassment occurs. However, their implementation often helps communities to become and remain more spiritually healthy and to reduce the occurrence of harassment.

Spiritual Call to Action

Then God said, “Let us make humankind in our image, according to our likeness....” So God created humankind in his image, in the image of God he created them.

Genesis 1:26a, 27a

Every person is made in the image of God. This reality undergirds everything we do as the people of God, especially when it comes to how we treat one another. All our words and actions - as individuals, as communities, and as a whole Church - must therefore be informed by this truth. We seek always to honor the divine image in one another and in ourselves through our words and actions. When we fail to do so, we hurt one another and we obscure God’s image in ourselves.

When Jesus highlighted the commandments to love God with all we are and have and to love our neighbors as ourselves,⁶ he reinforced for us that link. We cannot honor God and hurt our sibling;⁷ we cannot harm our sibling and hope to escape unscathed ourselves.⁸

When we are received into the household of God through baptism, these bonds are sealed in a new way. We promise to respect the dignity of every human being, to seek and serve Christ in each other, and to strive for justice and peace among all people.⁹ These promises do not leave room for us to harass or intimidate or retaliate against one another, nor do they permit us to stand by silently when others do these things. All of us, lay and ordained, are equally bound by these promises. All forms of harassment, aggressive pressure or intimidation, persecution, force, coercion, and molestation are violations of our baptismal vows.

At the same time, our understanding of God’s command to love one another is formed by the people around us. In particular, our race, ethnicity, and culture affect what we perceive to be harassment in ways we may not always be aware of. A firm tone of voice may be considered appropriate and respectful in one cultural context yet feel aggressive to someone from another context. Avoiding eye contact may be experienced as respectful by one person or a sign of mistrust by another. It is crucial that our conversations about how to respect the dignity of each person include voices from a range of cultural perspectives as we set the tone for

⁶ Matthew 22:34-40

⁷ 1 John 4:20

⁸ 1 Corinthians 12:12-27

⁹ BCP p. 305

what we consider “appropriate” in our settings. We must take into account the full range of power differences in a situation and prioritize safety first and comfort second as we seek to live out our love and respect for one another.

The image of God within each of us and the promises we make to God and one another in baptism call us to be better. When we become aware of situations that obscure God’s image in ourselves, in members of our communities, and in those we serve, we are compelled to act on that awareness.

The Legal and Ecclesiastical Position

Almighty God, whose loving hand has given us all that we possess: Grant us grace that we may honor you with our substance, and, remembering the account which we must one day give, may be faithful stewards of your bounty, through Jesus Christ our Lord. Amen.

For the Right Use of God’s Gifts, Book of Common Prayer, p. 827

Surprisingly, no comprehensive policy yet exists outlining general expectations for how all church members and others in church settings treat each other, although several existing church policies do address various types of improper conduct in our Episcopal communities.

Such policies include but are not limited to:

- Title III on Ministry and especially Canon III.1 on Lay Ministry.
- Title IV on Ecclesiastical Discipline for ordained ministers.
- Model Policies for the Protection of Children, Youth and Vulnerable Adults.
- Anti-Racism Training.
- Canons prohibiting discrimination against members and employees of the church as well as in the discernment process for ordination on the basis of race, color, ethnic origin, national origin, marital or family status (including pregnancy or childcare plans), sex, sexual orientation, gender identity and expression, disabilities or age.
- Charter for the Safety of People within the Churches of the Anglican Communion.

These may have implications for a faithful response to harassment (sexual and otherwise).

Harassment may be understood as a form of discrimination, and thus definitions of harassment are often part of laws against discrimination. Secular laws against discrimination

vary by region and country, and, in the United States, by state. Because TEC exists throughout the United States and in 16 other countries in several very different regions of the world, no single definition of harassment is likely to be helpful in ensuring that all people are treated with dignity and respect in all parts of the church. Still, some of the characteristics of harassment deemed illegal in different parts of the world may include:

- Unequal treatment or bullying.
- Unwelcome verbal, physical, or sexual conduct.
- Unwelcome behavior, including behavior motivated by a person's actual or perceived sex, sexual orientation, gender identity/expression, race/ethnicity, age, ability, or physical appearance or background.
- Behavior that creates/has the purpose of creating hostility, intimidation, humiliation or offense.
- Making a person's employment or role within the organization conditional on their acceptance of certain unwelcome conduct.

Although all Christians have made a commitment to love our neighbors as ourselves, unfortunately only clergy are currently subject to discipline under the canons for violations of these promises. Although some parish bylaws and diocesan canons provide for the removal of lay leaders (especially wardens and vestry members) from ministry leadership positions, regrettably, no church canons or churchwide policies provide for discipline when a layperson harasses another person (lay or ordained). Parishes, dioceses, and other church organizations that have relevant policies can use these as guides as they adapt the sample policies and best practices to the particular contexts of their communities.

In some cases, actions by individuals in the Church may give rise to secular lawsuits. It may also be necessary for the Church to involve the police or other secular legal authorities and support the prosecution of, or other legal action against, the harasser. In these and all harassment situations, the church has a responsibility to provide for the entire community's sense of safety as they consider the harasser's participation in the life of the church. When police or other secular authorities become involved, this is likely to increase the trauma some members of the community experience. Such involvement may also lead to a harasser escalating the unwanted behavior. Care should therefore be taken to engage law enforcement officers only, when necessary, when doing so is required by law, and with the goal of preventing and/or ending harm. Questions about whether or how to involve secular legal authorities should never turn on considerations of liability alone or minimization or denial of problems. It is vital for institutional leaders to take all allegations of harassment seriously so that prompt and supportive action can be taken for the well-being of all in the community.

How Can Congregations, Dioceses, and other Church Organizations Help to Prevent and Respond to Harassment?

You... were called to be free. But do not use your freedom to indulge the flesh; rather, serve one another humbly in love. For the entire law is fulfilled in keeping this one command: "Love your neighbor as yourself."

Galatians 5:13-14, CEB

The freedom for which Christ has set us free is the freedom to love actively: to grow in community with God and with one another in order that the whole body of Christ might flourish. As the apostle Paul taught, often we do not do the good we want to do; instead, we do the very thing we mean to avoid. When that happens, our communities - whether congregations, dioceses, schools, or other groups - can help us reorient ourselves toward that love which respects the dignity of every person, so that we can choose the good next time.

The choices that we make affect others. Much of harassment comes from a place of power and control. By responding to harassment, and setting standards, you are taking the control away from the harasser. By creating norms, you are taking the burden off of the one being harassed to create standards. Setting norms and standards is a first step in interrupting this power and control dynamic.

Even before your group has established a formal policy for preventing and responding to harassment, you can begin to set standards about how you intend to treat each other, whether in physical space or digital space. These standards should be modeled by ordained and lay staff and leadership. Consider especially the following norms:

- Make seeking consent a part of everything you do. It might feel odd at first to ask, "May I sit here?" "Can I give you a high five or a hug?" or "Would you like help carrying that?" and to hear "No thank you" as easily as "Yes, please". The more we make these behaviors normative in all our interactions, from greeting a small child to comforting the bereaved, the less we will have to work to remember it in situations that might otherwise feel sexualized, and the more we will honor God's image in one another and in ourselves.
- If a person says, "This is upsetting to me," practice taking that seriously, no matter the intent of the original comment. Keep in mind that the most important priority is everyone's safety and basic human dignity - not protection from uncomfortable truths. Sometimes we feel upset because we have been wronged, and sometimes we feel upset because someone has asked us to acknowledge that we have done wrong. Taking the moment seriously means taking the context seriously as well. When we make it a habit to stop, listen, and adjust our behavior even in the little hurts, it's easier to avoid hurting each other in bigger ways. It also makes us more likely to respond well when we do hurt each other in bigger ways.

- Practice letting go of opinions about other people's bodies. When we learn not to worry about how other people dress their bodies, how big or small those bodies are, how people manage what their bodies can or cannot do, etc., we don't have to worry about whether our comments about their bodies will be received the way we meant them.
- Consider your group's culture of ritual touch in addition to everyday touch. For instance, how do/could/will moments such as the passing of the peace truly honor the dignity of and image of God in each person, as they were created to do?
- Focus on building Christian relationships of mutual accountability grounded in God's call and love. Commit to telling the truth about yourselves and others and be honest about harm done by and to you. Practice receiving others' apologies with compassion rather than shaming them or minimizing the impact. Teach and model confession, lament, intercessory prayer, and making amends as key ingredients to building accountable Christian communities.

Our good intentions are easier to live out when our communities have agreed on what it looks like to love one another honestly and serve one another humbly. In addition to being intentional with our informal community norms, formal anti-harassment policies help us clarify our vision and standards for our community and give us a path forward when harassment does occur. You will find several examples of anti-harassment policies at www.episcopalchurch.org/safe-church. One or more may provide a useful template for your own group.

Whether you begin from a template or from scratch, don't go it alone. Your policy will better reflect your community and have more authority among your members if the group that creates it includes clergy, staff, and lay members who represent the diversity of your particular community. Recognize as you invite these individuals that members of vulnerable communities must be part of the work if it is to reflect their needs and their past experiences of harassment. Recognize also that many of these individuals are frequently asked to give the Church the benefit of their labor and experience and consider compensating them for this work if you are able to do so. If your local context includes intentional communities and/or community organizing networks, you may find these to be valuable resources as well.

Keep in mind that ordained and lay staff, volunteers, and members may all experience or witness harassment. Anyone may also harass, either intentionally or unintentionally. Therefore, your policy will need to provide all members of the community with options for responding if they do experience or witness harassment, as well as help everyone to understand how behavior may be experienced as harassing so they can avoid it. The more representative your group is, the more effective your policy will be at accounting for the variety of situations you may encounter.

Here are some other important considerations to take as you create your own anti-harassment policy:

- *Take a “bystander intervention” approach*

As the church, non-profit, and corporate worlds alike have incorporated more policies and trainings to improve workplace safety and inclusion, we have learned a bit about what works and what doesn't. Most of us don't just want the environments around us to be safe for us - we want them to be safe for everyone! Yet we can find ourselves getting resentful when trainings and policies seem to assume we are behaving badly and need to be kept under control.

The most effective way to help transform your culture is to assume that most people in your church, diocese, school, or organization mean well and want to help make a safe environment. Approach your policy writing, follow-up communications, and training from this perspective. Commit to supporting one another in becoming an accountable community where members speak and receive the truth about harm that is done. Teach people how to seek help, how to apologize, and how to make appropriate amends. Teach them what to watch for, how to intervene, and how to support those who have been harassed. The more you treat people like they're on the team, the more likely it is they'll act like they're on the team.

- *Plan how you will respond when harassment occurs*

Your policy should include a plan for ensuring that its goals and promises can be lived out. Identify a process for how to report a violation as well as what steps should be taken once it is reported. Include what interim steps you might take while the report is investigated, in order to ensure a sense of safety for those involved. Commit to seeing your process through and know whose responsibility it is to oversee which steps.

As a Church, we minister in hundreds of different cultural and legal contexts. It would be impossible to craft a detailed, “one-size-fits-all” response to harassment across all these contexts; however, there are a number of things you will need to consider as you plan your local policy:

- What is the reality of your context? Are you highly resourced in people? Is your system based on one person doing everything? Does everyone know each other? How is the reality of your context both a blessing and a drawback? How will that impact what it looks like to follow up and monitor complaints in your community?

- In particular, what resources are available in your local community to help you respond to harassment? Mental and behavioral health professionals, county social service agencies, local transformative justice groups, and community advocacy and support organizations may be able to provide training and consultation. Some situations, such as stalking, may rise to the level of a crime requiring legal action.
- Most people who experience harassment simply want the behavior to stop. While we want our policies and their enforcement to be rigorously fair, it's important to take into account the unique details of each situation. Some situations call for disciplinary action beyond a change of behavior; others do not. Remember that our goal is to be both fair and sensitive at the same time, to treat all with dignity and respect and to create a pathway to reconciliation in community for the one who has done harm, if they are willing to take accountability.

When you receive a complaint from someone being harassed, the following points shall be addressed:

- Provide compassionate care for the person making the complaint of harassment.
- Listen to the complainant's description of what happened and ask what they want done.
- Work for the best solution for the person(s) who have been harmed, prioritizing their self-determination whenever possible.
- Mutually agree on an Advisor for the complainant. This Advisor will walk with the complainant through the rest of the process.
- Mutually agree on an Advisor for the accused. This Advisor will walk with the accused through the rest of the process.
- Make it clear to all parties that any retaliatory action is prohibited and could lead to further disciplinary action.
- Follow the laws, canons and policies of your location, especially Title IV of the Canons of the Episcopal Church.
- Keep the matter as confidential as possible, without diminishing the complainant's agency or ability to appropriately function.
- Make a plan for the safety of the community.
- Deal with the situation in a timely manner, while staying in regular communication with the persons most directly involved.

- Keep the complainant's sense of safety as a primary concern as you explore options for resolution.
- Follow up periodically with the complainant, including after the initial resolution. Address any retaliation, whether direct (such as removing someone from a committee or job) or indirect (such as being treated coolly by members of the congregation).
- Keep in mind that interpersonal relationships are messy and there may be many faithful expressions of reconciliation for any given situation that include or don't include mediation.

You may want to develop a resource page for those who may have experienced harassment as well as one for those who have been accused of harassment. (Samples of such a resource can be found in Appendix B of this document.)

- *Identify who should respond to allegations of harassment (if the matter falls outside of a Title IV proceeding)*

Choosing who will respond is a matter that requires particular care and consideration. You will need to identify who can begin in this role immediately, and also whether this person or team will be your best long-term solution. In most cases, the best long-term answer to this question is to form or connect with an ombuds team or office. However, as this is a relatively recent approach to resolving instances of sexual harassment, most congregations, dioceses, and other Episcopal groups and organizations will not immediately have access to this model.

In the meantime, consider who in your sphere might match the following description.

An effective responder will be:

- A person of integrity with a history of trustworthy behavior.
- A bridge builder. They must work with all sorts of people in all sorts of situations and be able to help people come to common conclusions. They must be able to step outside of their own experience to have empathy with people of various backgrounds and identities.
- A problem solver. They must be a respectful listener so that they can help people find solutions appropriate to the situation instead of merely imposing a one-size-fits-all answer. They must be able to discern when an informal response is enough to stop the behavior, and when a formal process must be engaged. They should have a healthy approach to conflict and not be avoidant or overfond of it.

- Equipped. They must have sufficient time to dedicate to this work, as well as clear policies and procedures to guide their responses. They and you should be clear about their role: are they to facilitate a consensus, make recommendations, or impose a final and binding obligation? They will likely also need ongoing emotional and spiritual support, especially if and when they have a relationship with any party to the complaint.
- Discreet. They must be able to keep strict confidentiality when required and refrain from public speculation or private gossip when strict confidentiality is not possible.
- Connected but independent. A responder will not be able to earn full trust if they are so caught up in the church systems that they cannot take the risk of saying something the senior leadership doesn't want to hear. Nor will they be able to work effectively if they are so far outside that they do not understand how church systems operate. Ideally, they would also be conversant with canonical and legal standards as well as counseling practices.

Where might you find such a person? Unless you have the financial and human resources to hire an outside expert (and most of us won't), you'll likely need to find someone who can begin with the appropriate levels of trust and responsible character and learn the specific skills required for this role. In most circumstances, the best answer is to equip a team of at least two people, to maximize the possibility of trust and provide some collegiality and accountability for the intake coordinators themselves. Good candidates for the role might include:

- A lay person with outside training in this work (The fact that lay people do not vow obedience to the institution of the Church can be very helpful here.)
- A lay or clergy person with a previous counseling background
- A well-trusted, retired bishop of another diocese
- Someone on the staff of the parish/diocese/school/organization who is not the rector/bishop/senior leader
- Someone who has been a leader in a neighboring parish/diocese/organization but is outside the direct scope of your church or organization
- Someone without a formal role in your church or organization who has a high level of trust from all parties.

Finally, keep in mind that very few people trust any institution, including the Church, to respond well when harassment occurs. Your intake coordinator(s) will begin with a trust deficit to overcome. You can set the stage for easier trust building by gathering a small group of people who represent different stakeholders in your church or organization, and discerning together whom to appoint to this position, rather than having the rector/bishop/senior leader appoint them independently.

- *Communicate with the whole Body*

Once you have identified what behaviors you expect from one another and how you will respond when people behave otherwise, it's time to share the plan with the whole community. Make your policy widely available, including on your website and in hard copy. Create a short summary version of your policy that can be posted in plain view and/or handed out regularly. (A model policy of this sort can be found in Appendix B of this document.)

Discuss it as a community. Make these expectations as much a part of your community's care for each other as washing your hands. Have regular conversations with your ordained and lay staff and leadership about how your goals are being lived out and how your community can keep building on these goals.

- *Train leaders*

While keeping people safe from harassment is the work of the whole community, your leaders bear particular responsibility for helping model this well and offering constructive correction where needed. Train your leaders regularly on what you expect from them and make reconciliation a regular part of your life together.¹⁰

¹⁰ At the time of writing, TEC does not offer anti-harassment training directly; however, preliminary anti-harassment training materials are currently being created by our Safe Church Training vendor to reflect the guidelines outlined in this guide.

Appendix A: Examples of harassing behavior, possible remedies, and potential consequences

Examples of harassing behavior

This list of behaviors is not exhaustive; instead, it gives a clear indication of the types of actions that constitute harassment:

- consistently attacking someone’s professional or personal standing
- attempting to make someone appear incompetent
- deliberate sabotage of a person’s work or actions
- public or private displays of offensive material
- use of emails or texts to harass or insult, sent either to the individual or to third parties
- spreading rumors to third parties
- public humiliation by constant innuendo, belittling and ‘putting down’
- personal or aggressive insults
- aggressive gestures, verbal threats and intimidation
- unwanted physical contact, including invading someone’s personal space
- talking/shouting directly into someone’s face
- direct physical intimidation
- threats to a person’s security or their property
- not accepting a person’s “no”

TASK FORCE ON THE CARE OF CREATION & ENVIRONMENTAL RACISM

Membership

The Rev. Stephanie Johnson, Chair	Connecticut, I	2024
Ms. Alexandria Link, Vice-Chair	Western Massachusetts, I	2024
Dr. Delia Heck, Secretary	Southwestern Virginia, III	2024
The Rt. Rev. Cathleen C. Bascom	Kansas, VII	2024
The Ven. Betsy Bennett	Nebraska, VI	2024
The Rev. April Berends	East Tennessee, IV	2024
The Rev. Lynne Bleich Weber	Newark, II	2024
The Very Rev. Ellis Clifton	Michigan, V	2024
The Rev. Glenna Huber	Washington, III	2024
Ms. Sarah Nolan	Virginia, III	2024
Canon Barbara Okamoto Bach	New Jersey, II	2024
The Rev. Br. Simeon Lewis Powell (<i>resigned 12/2022</i>)	Northern California, VIII	2024
The Rt. Rev. Juan Carlos Quinonez	Central Ecuador, IX	2024
The Rt. Rev. David Rice	San Joaquin, VIII	2024
The Rt. Rev. Daniel Richards	Upper South Carolina, IV	2024
The Rt. Rev. Gregory Rickel	Olympia, VIII	2024
Dr. Andrew Thompson	East Tennessee, IV	2024
Ms. Ana West	Chicago, V	2024
Mr. Warren Wong	California, V	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024

The Task Force composition includes seven (7) lay, seven (7) clergy, and five (5) bishops totaling nineteen (19) members. One resignation occurred during the biennium period.

Meetings

The Task Force held two in-person meetings on November 14-17, 2022 and October 9-11, 2023 during the joint interim bodies' sessions in Linthicum Heights, Maryland. Monthly virtual meetings took place on February 1, March 1, April 12, May 3, June 7, July 5, September 6, October 4, November 1, and December 6, 2023. Starting in March 2023, the Task Force hosted a monthly Episcopal Creation Care Compline on the third Mondays which was led by Task Force members and attended by over 40 people monthly.

Mandate

The following resolution was assigned to the Task Force:

Resolution 2022- A086 Continuing the Task Force for Care of Creation and Environmental Racism

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

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

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

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

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

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

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

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

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

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

The Task Force was asked to advise and consult with Church Center staff and other interim bodies on the following three resolutions passed at GC 2022:

A087 [Net Carbon Neutrality by 2030](#)

A088 [Commit to the Pressing Work of Addressing Global Climate Change and Environmental Justice](#)

A089 [Resolution on Divestment & Just Transition](#)

Summary of Work

From the perspective of the Task Force, this ministry sits at the intersection of the three pillars of the church's work: Evangelism, Reconciliation and Creation Care. It is also intersectional across time and scale. We are grappling as a church with the sins of our past, while dealing with local, regional and global challenges. The earth is facing an existential crises in the form of the triple emergency: pollution,

biodiversity loss and climate change. We know that those who were least responsible for these challenges are being impacted the most.

Since the 1970's, the Episcopal Church has been a leader, both within our denomination and around the world, in responding to concerns and issues about God's creation. We stand at a nexus as a church and as a world. Decisions and choices made a century or more ago are playing out today in neighborhoods and communities across our church. The challenge for The Episcopal Church is deciding if we have the courage to continue to lead as we face hard truths about our past, present and future practices. If we as individuals, and as corporate members, are willing to follow the Way of Love we will find a future filled with hope and resurrection rather than despair and loss. This faithful calling to respond requires us to engage in truth-telling while listening carefully to the voices of those who have long been silenced through unequal power dynamics.

The Church's commitment to this urgent, faithful work can only be done when we dedicate enough resources. Our budgeting reflects our values and moral compass. Therefore we urge the Church to fully recognize our shared calling around creation care, climate change and ecojustice by allocating a total budget of \$1,800,000. We specifically request \$250,000 for climate mitigation, \$300,000 environmental racism redress, \$600,000 for creation care/ecojustice grants, \$37,000 for a new Standing Commission on Creation Care and Environmental Racism, \$150,000 for "Love God, Love God's World" curriculum on truth telling, \$75,000 for ongoing commitment to COP and COP focused on Biodiversity and \$472,000 for staffing including a dedicated full time staff person.

The Episcopal Covenant for Creation Care is a commitment to practice loving formation, liberating advocacy and life-giving conservation as individuals, congregations, ministries and dioceses. In this biennium, the Task Force focused on the following priorities flowing from this Covenant and established at its first meeting in Baltimore, November 14th – 17th, 2022.

1. Define and accelerate an eco-justice movement in the Episcopal Church through structures, processes, and institutional mechanisms including the ecojustice and care of creation grant program and eco-justice fellows.
2. Provide congregational and wider-church liturgy, worship and spiritual formation resources
3. Expand story-telling and advocacy around ecojustice, particularly using mapping as a tool.
4. Respond to the church's call for carbon neutrality through net zero grants, carbon offsets and land .

In just 12 months of meetings and small working group efforts, the TFCCER accomplished much toward our goals. As noted above, we had our first meeting in November 2022. Many of us met for the first time that month, but we are all equally passionate about God's creation, responding to climate change

and addressing environmental racism. We wondered together how best to draw the church closer together around these spiritual, moral and ethical challenges, and with God's help, opportunities for new life for Creation and the church. Intentional monthly meetings with shared prayers and concerns deepened our personal relationships, forging new friendships and opportunities for working together.

The following highlights our year long efforts with further details below, including supporting resolutions and budget requests.

- 1) A Eco-justice and creation care grant round with over \$160,000 awarded to 12 recipients and the planned launch of a 2nd round.
- 2) The start of a monthly Creation Care Compline (attended by 40-45 people regularly) and a "pilot" eco-grief space in Baltimore to be offered at GC 81.
- 3) Thoughtful, creative visioning for the future including a plan for an ecojustice loan program to meet net zero goals responding to Ao87 and the creation of a new Standing Commission. (Resolutions 1 and 2)
- 4) Ecojustice summer fellowship program summer 2023 with 6 young adults
- 5) Expanding use of the asset and environmental mapping program at COP28 and the All About Love Conference to respond to issues of ecojustice.
- 6) An exploration of environmental reparations for the church to consider in the next triennium.
- 7) A white paper with specific recommendations for carbon offsets for DFMS travel for 2024/25 implementation.
- 8) A biodiversity resolution approved at Executive Council for continued engagement at COP and the biodiversity COP adjacent meetings.
- 9) A series of questions centered on environmental justice and climate change for the Presiding Bishop candidates.
- 10) A growing collaboration with the Standing Committee on World Mission based on two meetings and a shared resolution to GC 81 for Anglican Communion Forests. (Resolution 3)
- 11) Networking and sharing of ideas with DFMS and across the church.

Eco-Justice and Creation Care Grant Program

Since 2017, the Advisory Council on Care of Creation or subsequent Task Force on Care of Creation and Environmental Racism, has developed grant standards, offered training webinars for potential applicants, and grant applicant coaching. In every round, the reviews of the grant applications are done by the TF members in teams. The support of the DFMS staff in organizing this effort has been invaluable. Since the program began, \$960,000 has been awarded. The TF believes that this program is some of the most important and critical work that can be done for the Church and God’s creation. The local, diocesan and regional impacts of this grant program is incalculable from supporting startup ministries to helping to sustain visionary, cutting edge programs and initiatives. We urge the GC to expand this program in the next triennium requesting \$600,000.

The 2023 Creation Care Grant round aimed to support long-term ministries that focus on addressing the inequitable and systemic impacts of environmental racism and support regional and local collaborative ecojustice projects. Projects that respond to these pressing justice matters by engaging in advocacy, civic engagement, and developing climate change resiliency were given priority. Programs that resourced faith-based theological engagement around environmental issues in local communities, including responding to environmental racism and making progress toward environmental reparations were also favorably considered. Priority was also given to efforts that involved youth and young adult participation, communities of color and Indigenous peoples.

The Task Force received 51 applications from communities throughout the Episcopal Church. Each application was separately reviewed by two members of the task force, and then discussed by the entire team of eight grant readers. Eleven grants totaling \$168,267 were awarded in the first round of funding.

There will be one more round of granting in 2024 following the submission of our Blue Book report. There is approximately \$100,000 remaining. The following shows the breadth and variety of the grants awarded in just the 2023 round awarding a total of \$168,267 to 11 recipients. The Task Force requests \$600,000 to continue this transformative and life giving efforts across the church.

2023 Creation Care Grants:

Solar Equity Project in Peoria, Illinois – \$9,000

St. Paul’s Episcopal Church, Episcopal Diocese of Chicago

“Community education and engagement to support access and equity for a 1,000-household solar project in Peoria.”

Energy Literacy, Advocacy, and Connection – \$9,700

Holy Spirit Episcopal Church, Waco, Texas, Episcopal Diocese of Texas

“Host and facilitate workshops with local communities of faith focusing on renewable energy; conduct energy audits to improve the energy efficiency of buildings; weave global environmental justice connections.”

Environmental Repair: Eco-theology and the care of our common home / Curso de Reparación Ambiental mediante la cartilla: La eco teología y el cuidado de nuestra casa común, un aporte para el eco ministerio en Colombia y el Mundo – \$10,000

Diocesis Episcopal de Colombia

“Faith formation on ecological crises and environmental repair, and scaling up of an existing “circular economy” program recycling second hand materials and goods.”

Food Justice for Upper South Carolina – \$13,387

St. Martin’s in-the-Fields Episcopal Church, Episcopal Diocese of Upper South Carolina

“Campaign on addressing food insecurity and environmental injustice with the grassroots coalition organization MORE Justice and 27 local congregations, including St. Luke’s Episcopal Church and Trinity Episcopal Cathedral.”

The Big Book of Creation and Environmental Racism – \$14,700

Christ Church Glendale, Episcopal Diocese of Southern Ohio

“Collaborative partnership with Tikkun Farm, an urban farm in Mt. Healthy, Ohio, to improve access to green space, support urban farms and gardening, and host worship and formation events related to environmental justice.”

Gardens and Pollinators: Enhancing Sustainability Awareness Among Youth Who Are Incarcerated- \$15,000

St. James Episcopal Church and Grace Episcopal Church, Episcopal Diocese of Central New York

“Expansion of community garden and apiary program for incarcerated youth; two Central New York congregations in collaboration with Helping Hands Urban Farm Garden.”

HOPE – Faith and Resilience in Marginalized Communities – \$15,000

St. James House of Prayer Episcopal Church, Episcopal Diocese of Southwest Florida

“Addressing flooding and water-quality impacts by strengthening five stormwater drainage ponds in East Tampa with natural and sustainable green infrastructure, in collaboration with nine interdenominational congregations and the Hillsborough Organization for Progress and Equality.”

Green Refuge: Tackling Environmental Racism in an Urban Environment through Refugee Empowerment – \$18,480

St. Paul’s Within the Walls, Rome, Italy, Italy Convocation of Episcopal Churches in Europe

“Project of Joel Nafuma Refugee Center, an outreach ministry of St. Paul’s Within the Walls Episcopal Church in Rome to address issues of environmental racism and urban pollution while empowering refugees through environmental stewardship and community engagement.”

Rhode Island Episcopal Relief and Resilience Pilot Project – Aquidneck Island – \$18,000

Episcopal Diocese of Rhode Island, Creation Care Ministry

“Pilot climate resilience project on Aquidneck Island to assess climate vulnerabilities, enhance community emergency preparedness and adaptation planning, host environmental justice liturgy events and pilgrimage, and share model with other Episcopal dioceses and communities.”

An Episcopal Path to Creation Justice Pilot Program – \$20,000

The Creation Care Justice Network, Episcopal Dioceses in Massachusetts

“Support the continued development of the Episcopal Path to Creation Justice with resources for creation justice prayer and formation, advocacy, and action, running a pilot program and preparing to make the program publicly available in 2024.”

Answering the Call for Climate Justice: Planning for Carbon Neutrality by 2030 – \$25,000

Episcopal Diocese of Northern California, Commission on the Environment

“Partnership with Interfaith Power and Light and Energy for Purpose to pursue the climate justice goals of the Episcopal Diocese of Northern California through training, goal-setting, and in-depth

energy-efficiency assessments for 10 congregations to build a roadmap for achieving carbon neutrality by 2030.”

Environmental racism and eco-justice initiatives

Ecojustice Fellows Pilot Project

In 2023, the Episcopal Church’s Task Force on the Care of Creation and Environmental Racism piloted an Ecojustice Fellows program to engage young people and attend to specific environmental racism and justice intersections. Six Episcopal young adults were selected as fellows. All were between the ages of 22 and 28, with varied races, genders, and sexualities; collectively, they represented six dioceses in Provinces III, IV, V, and VIII.

Fellowship priorities included relationship building, skill development, and development of independent projects. These priorities were supported through regular online gatherings from June through October and attendance at It’s All About Love in Baltimore (July 2023). The conference allowed fellows to establish relationships that carried through the rest of the fellowship, to connect to the wider Church, and to make connections critical to their project development. Online training included data mapping and eco-theology (from Task Force members), story sharing, and organizing. Each fellow designed and implemented an independent, creative project. These included an ecojustice liturgy for a local food support organization, a mid-autumn vesper service combining Asian and Episcopal spirituality, a workshop for LGBTQ youth to make climate zines, a podcast on Episcopal responses to the climate crisis, data support on environmental racism for a local nonprofit, and workshops for congregations conflicted about the climate crisis. Partners included Episcopal and ecumenical groups (in-person and online) and climate-concerned nonprofits. A fellowship coordinator and staff from the Department of Reconciliation, Justice and Creation Care provided one-on-one support for these independent projects. The energy and enthusiasm among the fellows was unmistakable. As a group, they reported deepened commitments to the Episcopal Church, especially the church’s ecojustice efforts. Several cited It’s All About Love as a defining moment in understanding the church’s commitment to ecojustice; others were enthusiastic about linking concern about climate change with their faith. All described how important it was to connect with other young Episcopalians with similar interests. Anecdotally, fellows and their projects have been well-received by the church; at least two have been invited to share their projects beyond the original audiences. The Task Force highly recommends funding to invest in young adults through fellowships and similar programs. Given the robust response to this pilot program and the growing concerns about climate and justice from our young adults, we request a total of \$120,000 to expand this program.

Environmental Reparations

The concept of environmental reparations was a significant theme in the Task Force's discussions and work. Environmental reparations emerge from the recognition that the legacies of colonialism and slavery leave lasting scars not only on human communities but also on the land and on human relationships with the land. Plantation agriculture degraded lands across the south, and the descendants of enslaved people continue to suffer disproportionately from the effects of that degradation. Additionally, the effects of climate change today and in the future follow the tides established by colonialism, in which the Church played a significant role. Finally, most churches in the U.S. sit on land that was taken by coercion from its original inhabitants. Reconciliation with oppressed communities therefore requires some method of correcting these past ecological violations; this is the insight of environmental reparations.

The work of environmental reparations must be a central mandate for any future work in environmental justice and creation care. This may look like divestment from industries that perpetuate ecological violence, such as fossil fuels, and reinvestment in the resiliency of communities of color, or it may involve supporting social and environmental work that empowers marginalized groups. At a minimum it must include sincere efforts toward land restitution; that is, toward finding mechanisms for returning control of land to the descendants of its original Indigenous inhabitants. The TF requests \$35,000 to foster this work through workshops and training.

Carbon Offsets

In response to General Convention resolution 2022-A087, members of the Task Force developed a set of policy guidelines for purchasing verified carbon offsets. Resolution A087 commits the Church to carbon neutrality by 2030. While the primary focus must be on reducing actual emissions, carbon offsets, when done responsibly and in good faith, can be a secondary part of work toward this goal by compensating for emissions from unavoidable travel. The guidelines developed by the Task Force emphasized transparency and accountability, as well as an insistence that offsets should never take the place of meaningful steps toward reducing emissions. It is the hope of the TF that DFMS will begin using carbon offsets for travel in 2024. It is expected that \$90,000 will be necessary to implement this effort.

Ecojustice Advocacy through mapping

The Task Force partnered with the General Convention Office, building on the work of the Rev. Dr. Molly James in the Explore Your Neighborhood Tool. This tool provides a demographic overview of Episcopal congregation's physical locations. It includes parameters such as poverty, housing cost, race, education, and access to groceries and internet. The Task Force developed resources that allow

congregations to add eco-social justice data layers such as historical areas of redlining, the EPA's Eco-Justice Screen, the CDC's Social Vulnerability Index, NOAA's 3-meter sea level rise data and a plethora of other easily accessible and free government data. These materials were presented at sessions during the It's All About Love Festival in Baltimore, July 9th – 12th, 2023. It was also showcased at two talks at the COP28 meetings in Dubai, December 5th and 6th, 2023. In the previous triennium the TF has begun to pilot advocacy training using the maps however given the shorter timeframe for the TF this biennium we were unable to continue this effort. . The next step then is to expand regional advocacy trainings to make broader use of the maps engaging Episcopalians across the church in lifting their voices against eco-injustices and environmental degradations. The Task Force remains committed to growing this advocacy work in the next triennium and requests \$105,000 to partner with faith based advocacy groups in training around eco-justice and responding to environmental racism.

Support for “Love God, Love God’s World” Curriculum

Members of the Task Force served as advisors to the forthcoming creation care curriculum (Love God, Love God’s World) developed by the office of Reconciliation, Justice and Creation Care. Focusing on climate change and eco-justice this initiative will invite small and large group learning and reflection to deepen faith based engagement and love for God’s creation. This project, designed similarly to the Sacred Ground project, will focus on truth telling while expanding understanding across the church concerning environmental racism, local and regional eco-justices concerns and the climate change crisis. Funding of \$150,000 is requested to broadly expand this work across the church.

Continued commitment to financial efforts to respond to the climate crisis

The Task Force on Care of Creation and Environmental Racism continues to support resolutions from 2015 through 2022 which called on the DFMS to divest from Fossil fuels and reinvest in renewables, support just transition and consider banking practices in light of climate change. The TF also urges the Church Pension Fund to be mindful of the church’s desire to become more invested in renewables and to continue reporting back to GC about its efforts toward sustainability.

Liturgy and liturgical resources for God’s Creation

Compline and prayers

The Task Force recognized the power of communal prayer for the sake of God’s creation and for the nourishing of those who are engaged in eco-ministry around the church. A small team of task force members began developing outlines for creation centered compline services in early 2023. On March 20, 2023, we began offering monthly Creation Care Compline services via zoom that continues to

attract worshippers internationally from the British Virgin Islands, the United States, Canada, and Africa. Attendance has been consistently high as people from TEC and other denominations join together to pray for current environmental concerns, local eco-justice ministries, and hopes for the world. The international attraction of these worship experiences was made even more significant that the format and services were included in the United Nations Climate Change Conference (COP28) from November 30th until December 12th, 2023 in Dubai, UAE. These evening worship offerings help to emphasize God's common call to all for proper care of creation and the collaborative work we are called into to reverse the environmental damage humankind has done to our world. An unanticipated but meaningful outgrowth of our monthly prayer time is a time for sharing at the conclusion of our worship, offering announcements about local, diocesan, and provincial events and initiatives. From this, ideas have been shared for adaptation and implementation by others and the task force has started an informal networking group. These monthly services are scheduled until General Convention. Given how well received and meaningful these services have become, we anticipate offering them throughout the next triennium.

Another offering in the area of prayer was a workshop offered by The Reverend Ellis Clifton, Jr. (Diocese of the Virgin Islands) during *All About Love*. Assisted by the Reverend Betsy Bennet (Diocese of Nebraska) the international and multi-generational grouping of participants in this interactive workshop were offered an opportunity to reflect on the different forms of prayer listed in the Catechism of our Book of Common Prayer and the group was reminded of the richness of our prayer life when we offer our prayers in the many forms of prayer that exist. Workshop participants were invited to create original care of creation/eco-themed prayers in one or more of the various prayer types just discussed. The workshop ended with participants submitting copies of their prayers for possible inclusion in a compilation of original eco-themed prayers for use at GC 81.

Eco-grief space

The Task Force's emphasis on prayer and worship was an important component of our participation at *All About Love* in Baltimore, Maryland. In a July 2022 article published in *Everyday Health*, Ecological (Eco) Grief is defined "as mourning of the loss of ecosystems, landscapes, species, and ways of life due to climate change." The medical profession has begun the study of this human condition and its effects on humankind. At *All About Love*, the Task Force created a beautiful Eco Grief Space as a respite from the day's busyness, as a holy and prayerful space where festival participants could process information received at the event and to consider how ecological concerns may affect them personally. The space was wonderfully adorned by lighting, greenery and water filled bowls, effectively giving the indoor meeting area a "garden effect" allowing visitors to thoughtfully address the impact of eco-grief in our lives through: prayer, reading, listening, grieving, and engaging in quiet conversation about areas of ecological concern and the appropriate care and ministry to God's world. members of the TF were available as eco-chaplains to share and pray with visitors. At times, the various sights and smells

offered a multi-sensory experience. We discovered that the space was utilized intergenerationally - teens, young adults, and seniors as well as some of the staff from the host facility.

Proposed Resolutions

A020 Establish a Standing Commission on Care of Creation and Environmental Racism

Resolved, that the 81st General Convention amend Canon I.1.2.n by adding a new subsection 6 thereto, to read as follows:

I.1.2.n

6. A Standing Commission on Care of Creation and Environmental Racism shall be created to continue the work of the Advisory Council (GC 2015), Task Force (GC 2018), and Task Force (GC 2022). Establishment of this Standing Commission will be an important step in acknowledging that care of creation and response to environmental injustices is an integral and ongoing work of God's people and church.

It shall be the duty of the Commission to:

- i. Support programs that respond to eco-justice concerns, address systemic environmental racism, and work to alleviate environmental burdens on indigenous communities and actively respond to the call for environmental reparations.
- ii. Continue to lead the church in responding to the moral and ethical implications of climate change, biodiversity loss and local environmental degradation.
- iii. Expand, support and promote the Creation Care Covenant recognizing that this work seeks to align with the loving, liberating and life giving work of evangelism and beloved community.
- iv. Provide expertise on programs that respond to the climate crisis and eco-justice including a carbon offset program, efforts for just transition, land based carbon capture initiatives, increase and utilize the capabilities of the Episcopal Asset Map.
- v. Continue the creation care and ecojustice grants program and ecojustice fellows program to accomplish the above objectives.

vi. Develop theological materials and liturgical resources to support church wide creation efforts.

v. Recommend strategies to Executive Council and DFMS for the development and support of networks concerning eco-justice and care of creation.

vii. As requested, provide policy support to Executive Council and the Office of Governmental Relations on environmental and eco-justice matters.

And be it further

Resolved, that General Convention approve a budget of \$1, 412, 500 to complete the tasks noted above.

A021 Create a Care of Creation Loan Program for Episcopal Dioceses

Resolved, That the 81st General Convention of The Episcopal Church (TEC) affirms its Episcopal Covenant to Care of Creation commitment to form and restore loving, liberating, life-giving relationships with all of Creation; and be it further

Resolved, the General Convention allocates \$3 million in TEC endowment funds as a loan portfolio to establish a Care of Creation loan program for dioceses to utilize as a funding resource for primarily capital projects to advance the goal of bringing the Church into carbon net zero compliance by 2030 (2022-A087), and that start up funds of \$30,000 annually be allocated to launch this effort; and be it further

Resolved, this General Convention directs the Executive Council to assign responsibility for oversight of these assets to its Economic Justice Loan Committee (EJLC) for loans that support greater Care of Creation and eco-justice initiatives; and be it further

Resolved, that the Economic Justice Loan Committee, consult with the Task Force on Creation Care and Environmental Racism (or its successor) and will add a liaison, to create and implement a program format mirroring EJLC best practices by the Treasurer's Office.

Explanation

The funds in the portfolio are used on a revolving basis to provide loans directly to dioceses for development capital programs and projects. The principal, upon repayment, is then re-loaned to

other dioceses. All the loans pay interest, and that interest income is used to support TEC's programs. The net carbon zero resolution passed at the 80th General Convention, while ambitious and visionary in scope, did not provide financial resources to implement this mandate. Using a revolving loan fund model, already successfully used by the Episcopal Church, will help advance this mandate and other critical eco-justice mandates.

A022 Support the Anglican Communion Forest Initiative

Resolved, that in support of The Anglican Consultative Council resolution passed at ACC 18 in Ghana in February, 2023, we recognize that the integrity of creation is under threat and at risk of collapse and there is urgent need to reduce our carbon footprint and protect biodiversity; and be it further

Resolved, that the Episcopal Church affirms the potential of the Communion Forest initiative launched as a legacy of the 2022 Lambeth Conference; and be it further

Resolved, that the Episcopal Church join with other Churches of the Communion to join in this initiative to be ambitious in using their God-given assets, to weave creation care into the spiritual and liturgical life of the Church; and be it further

Resolved, that we commend the collaboration of the Anglican Alliance and Anglican Communion Environmental Network, and encourages the dioceses, seminaries, congregations and other ministries in the Episcopal Church to share with them information about their existing and new activities.

TASK FORCE ON COMMUNION ACROSS DIFFERENCE

Members

The Rt. Rev. John Bauerschmidt, Co-Chair	Tennessee, IV	2024
The Rt. Rev. Dr. DeDe Duncan-Probe, Co-Chair	Central New York, II	2024
The Rev. Kelli Joyce, Secretary	Arizona, VIII	2024
The Rev. Phyllis P. Bartle	Central Florida, IV	2024
The Rev. Gary Wm England	California, VIII	2024
The Rev. Canon Christine Faulstich	Texas, VII	2024
The Rev. Canon Jordan Hylden	Dallas, VII	2024
The Rev. Mark Michael	Washington, III	2024
Karen Perka	Maine, I	2024
The Rt. Rev. Bonnie Perry	Michigan, V	2024
The Rt. Rev. Moises Quezada Mota	Dominican Republic, IX	2024
Mr. Randy Winn	Springfield, V	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024

Mandate

2022- A056 Communion Across Difference

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

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

Resolved, That the Task Force will seek to build on the Blue Book report of the previous triennium, continuing to seek a lasting path forward for mutual flourishing consistent with this Church’s polity and the 2015 “Communion across Difference” statement of the House of Bishops, affirming (1) the clear decision of General Convention that Christian marriage is a covenant open to two people of the same sex or of the opposite sex, (2) General Convention’s firm commitment to make provision for all

couples asking to be married in this Church to have access to authorized liturgies; and also affirming (3) the indispensable place that the minority who hold to this Church's historic teaching on marriage have in our common life, whose witness our Church needs; and be it further

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

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

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

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

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

Summary of Work

The work of the Task Force on Communion Across Difference is centered around the mandate given to us by the 80th General Convention. We seek a lasting path forward for the mutual flourishing of all Episcopalians, amid our differing theological convictions about Christian marriage. We have been guided not only by a shared commitment to the pursuit of such a sustainable path forward, but also by three specific realities articulated in our mandate. We all recognize that General Convention has made a clear decision that marriage in the Episcopal Church is open to same-sex couples. We also recognize that General Convention has acted to ensure that all couples seeking to be married in the Episcopal Church have the opportunity to do so using authorized liturgies, in every diocese where same-sex marriage is provided for in civil law. Finally, we affirm that there is an indispensable place in our common life for members of this Church, now in the theological minority, who believe that Christian marriage is a covenant between a man and a woman.

All work toward the possibility of a healthy common life depends on the genuineness of a shared commitment to each other's well-being, in which all sides are willing to sacrifice at least some of their preferences, but in which no one is asked to sacrifice either conscience or dignity. Mutual flourishing is not the same as mere co-existence. We cannot accept a future in which we would essentially have two separate "churches" operating within their own silos - a larger one, progressive on the question of same-sex marriage, that makes up the majority of the Episcopal Church, and a smaller and isolated conservative one. Instead, we reaffirm the understanding of mutual flourishing offered by the first Task Force on Communion Across Difference in its Blue Book Report to the 80th General Convention. Mutual flourishing asks our willingness:

- To grow together in mutual love, affection, and trust, recognizing our differences;
- To honor the polity of The Episcopal Church and the authority of the General Convention;
- To respect the dignity of one another as we engage the challenging work of discernment and transformation, so that all members, faith communities, and dioceses of The Episcopal Church may experience an equal, indispensable, and unqualified place and voice in the shared Body of Christ;
- To speak and listen to one another and strive, wherever wounds may exist, to do all in our power to labor together toward reconciliation, walking together in the way of love so that God's reconciling mission may flourish;
- To pray without ceasing for one another and for God's grace to guide us more deeply into loving relationships.

We also recognize, however, the reality of past and present barriers to such mutual flourishing. We are not starting from a blank slate. Many of us have experienced rejection or mistreatment over the years. Solutions or pathways that might work in theory may be impossible in practice if there is not a

sufficient and shared desire to move toward relationships of trust and support, and to unite around areas of common belief and commitment. The pain of the past must not be papered over or dismissed, even as we seek a way forward to a new future of genuine communion across difference.

We are persuaded that safety is an essential prerequisite for healthy relationship and mutual flourishing. The history of past conflict means that such safety cannot simply be presumed; it must be actively pursued. Different people and communities will need different things in order to feel safe as we undertake this work, based on both their past experiences and current vulnerabilities. No policy or program can guarantee a way forward where everyone feels safe at all times, or where no vulnerability is required. Yet we believe that “perfect love casts out fear.” (1 John 4:18) Although courage, hard work, and time for the healing of old wounds will be necessary for us to feel consistently safe together, as far as possible, it is our shared desire that everyone be safe in our congregations, dioceses, and in the Episcopal Church as a whole.

Safety does not mean or require agreement, nor does it mean pretending that we think our disagreements are in some way unimportant. There are those on "both sides" who believe the other "side" is committing or endorsing serious sin. This is not a light matter. The only way forward that can promote mutual flourishing is one in which we are willing to acknowledge that it is possible for others to disagree with our own theological position in good faith, and to be genuinely seeking to love God and their neighbor, acting neither from animus and bigotry nor from any disregard for sexual ethics and the sanctity of Christian marriage.

We also note the importance of distinguishing between theological commitments and political positions. As Christians, our theological and political beliefs are neither wholly identical nor wholly disconnected. Our theology can shape our politics and our politics can shape our theology, and yet, knowing someone's theology of marriage is not the same as knowing their political position on marriage. A conservative position on the theological definition of Christian marriage can co-exist with a firm commitment to civil rights and legal protections for LGBTQ people. We note with appreciation, for example, the Communion Partners' public statement in November 2021 that they were “gravely concerned by proposed legislation criminalizing LGBTQ+ people in Ghana,”¹ and the unanimous statement of the House of Bishops in March of 2022, denouncing “legislative initiatives and governmental actions targeting trans children and their families.”²

In our own discussions, we were united in our appreciation of language taken from the Evangelical Lutheran Church in America's 2009 social statement on human sexuality, which emphasized that while there was significant theological disagreement among them regarding same-sex marriage, “this church is united on many critical issues. It opposes all forms of verbal or physical harassment and assault based on sexual orientation. It supports legislation and policies to protect civil rights and to prohibit discrimination in housing, employment, and public services. It has called upon congregations and members to welcome, care for, and support same-gender couples and their families and to advocate for their legal protection.”³ We, too, consider ourselves united on these critical issues.

Grounded in these shared principles, we have worked to understand current sources of conflict, fear, and pain that impede reconciliation and mutual flourishing, and to imagine alternative approaches that would allow for greater and healthier fellowship. Each of these approaches would require mutual compromise, but none of them would require compromise of conscience or dignity. We have structured our conversations around three major categories: Ordination and Clergy Deployment, Prayer Book and Liturgical Revision, and Common Life.

Ordination and Clergy Deployment

There is a shared concern among the members of our task force regarding the current state of access to the discernment process for ordained ministry and to search processes for employment. Although under the canons of the Episcopal Church no one should be categorically excluded from genuine access to such processes either for holding a theological position on marriage compatible with the one expressed in the catechism of the 1979 Book of Common Prayer or because of their sexual orientation, gender identity and expression, or marital status, such exclusion does appear to occur with some frequency. Nevertheless, the existence of such categorical exclusions is unlikely to be officially acknowledged by those with the authority to enact them. Even if no overt discrimination in the ordination process, call process, or acceptance of letters dimissory is evident, if a diocese intentionally discourages certain categories of people from entering those processes or sending letters dimissory, the discriminatory effect is the same.

In dioceses where there is little to no internal disagreement regarding same-gender marriage, this may not be an issue of major concern. However, the problem can be quite acute for parishes who affirm a theology of marriage that is not the same as that of their diocese or its bishop. Our work on this topic has focused on the principle of reciprocity, and seeks to find a way forward in which parishes throughout the Episcopal Church are meaningfully enabled to call a member of the clergy whose views on marriage are compatible with their own and to sponsor for genuine discernment of a call to ordination any individual in whom they perceive such a call. We see no pastoral or theological benefit in forcing any congregation to hire a priest whose theology of marriage is contrary to their own. In the case of the ordination process, we propose a system of partnerships between dioceses that would allow an aspirant whose theology of marriage is contrary to that of their diocese to engage in parish-level discernment in their home congregation, then continue the remainder of the ordination process in a companion diocese.

Prayer Book and Liturgical Revision

Our conversations about liturgical revision have centered around two primary topics. The first is the question of what marriage liturgies will be authorized for use in the future. For progressives, it is crucial that an inclusive marriage liturgy be approved via the process laid out in Article X of the Constitution of the Episcopal Church, and thereby be given “prayer book status.” For conservatives, the continuing authorization for use of the 1979 Book of Common Prayer and its marriage liturgy is key. We do not

see these desires as mutually exclusive. The formal adoption of an inclusive marriage service as part of the prayer book can take place alongside continuing churchwide authorization of the 1979 marriage service for those who prefer it.

The second focus of our conversation has been the implications of revisions to the marriage service on the canonical definition of the doctrine of the Episcopal Church. The Book of Common Prayer is a defining standard of the doctrine to which all members of the clergy vow their loyalty, and it is an offense under Title IV of the Canons to hold and teach “publicly or privately, and advisedly, any Doctrine contrary to that held by the Church.” We believe that it is possible to authorize an inclusive marriage service at the prayer book level, and to produce new language for the catechism, in such a way that those who hold to the theology of marriage expressed in the 1979 Book of Common Prayer will not be in violation of their vows. Our hope is that revision of these texts will value expansiveness in its language. We also believe it is prudent to specify explicitly in Title IV’s canonical definition of doctrine that ordained persons who hold the theology of marriage expressed in the 1979 Book of Common Prayer have no reason to fear that this will become forbidden under the canons. Just as Episcopalians who hold widely diverging theologies of the Holy Eucharist can affirm the statements made about the Eucharist in the catechism, so too we hope that any future doctrinal definitions of marriage will be written to emphasize our points of agreement without making claims about the areas where we disagree.

Common Life

The topics discussed under the heading of Common Life are those matters that cannot be meaningfully addressed by legislative action on the part of General Convention, which nevertheless play a key role in determining the possibility of mutual flourishing and genuine relationship rather than mere co-existence. For example, a shared commitment to standards of pastoral care that reject conversion therapy and other attempts to change an individual’s sexual orientation and/or gender identity is a matter of great importance to many progressives, especially when considering the possibility that LGBTQ youth will be raised and nurtured in the faith in the context of theologically conservative Episcopal parishes. Similarly, we believe that transparency on the part of priests and parishes concerning their theology of marriage and human sexuality is crucial, so that LGBTQ individuals can make an informed decision when determining whether they wish to join a given community.

There may be situations in which a particular member of the clergy is unable to provide necessary pastoral counseling – for example, a priest who holds that marriage is only between a man and a woman may be unable to provide adequate pastoral care to an individual whose same-gender marriage is experiencing difficulty. In such cases we hope that Episcopal clergy will proactively seek out colleagues to whom they may refer individuals in need, so that all people might have access to pastoral care in our Church. Under no circumstances should any individual be denied pastoral care or access to the sacraments on the basis of their theological position on same-gender marriage.

Conclusion

Our work together as a task force has been for us a source of fellowship, joy, and hope. We have experienced firsthand the reality expressed in the claim that we are indispensable to each other. Our theological differences are in many cases quite profound, but in our commitment to the Gospel of Jesus Christ and to the safety and dignity of all people we are entirely united. The proposals that we now offer to General Convention are the product of a process characterized by mutual vulnerability and honest listening, with present fears and past injuries taken seriously by all. They have been shaped by fervent prayer, both together as a task force and individually in our private prayers.

Detailed explanations accompany each of our proposed resolutions. The work of this task force, however, cannot be reduced to any one of our formal legislative proposals, or even to all of them taken together. We believe that these proposed resolutions are necessary elements of a just and sustainable path toward continued fellowship, but they represent only a part of the *beginning* of such a path, not its end. We believe that institutional and hierarchical power should not be used to drive out or keep out those whose theological belief concerning marriage is in the minority within a given diocese or the wider church. Canonical changes to this effect are essential, but alterations to formal policies can only clear the space for processes of healing and reconciliation to begin, they cannot complete them. That will require the work of the Holy Spirit in the lives of individuals, worshipping communities, dioceses, and the whole of The Episcopal Church as we choose to walk together along a path to mutual flourishing that can only be walked by faith.

End Notes

- 1 <https://communionpartners.org/criminalizing-lgbtq-in-ghana-nov-10-2021/>
- 2 <https://www.episcopalnewsservice.org/2022/03/22/house-of-bishops-condemns-ukraine-war-anti-transgender-legislation-at-first-in-person-gathering-since-covid-19-pandemic/>
- 3 <https://www.elca.org/Faith/Faith-and-Society/Social-Statements/Human-Sexuality/>

Proposed Resolutions

A090 Authorization of 1979 Book of Common Prayer

Resolved, That the 81st General Convention amend Canon II.3 by adding a new Section 9 thereto, to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

II.3

Sec. 9. The Book of Common Prayer as accepted by the General Convention of this Church in 1979 is authorized for regular use at any service in all dioceses of this Church.

<Proposed amended resolution text showing exact changes being made:>

II.3

Sec. 9. *The Book of Common Prayer as accepted by the General Convention of this Church in 1979 is authorized for regular use at any service in all dioceses of this Church.*

EXPLANATION

The 1979 Book of Common Prayer was memorialized by General Convention Resolution 2018-A068, “ensuring its continued use.” Our proposed canonical change would continue to ensure continued use of the 1979 Book of Common Prayer, providing it with a clear and stable place in our Church’s worship. Like the memorialization of the 1979 Book of Common Prayer, this resolution is proposed in anticipation of future additions to and amendments of the Book of Common Prayer as provided for in Article X of the Constitution of The Episcopal Church.

A091 Definition of doctrine

Resolved, That the 81st General Convention amend the definition of “Doctrine” in Canon IV.2 to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

IV.2.

Doctrine shall mean the basic and essential teachings of the Church and is to be found in the Canon of Holy Scripture as understood in the Apostles and Nicene Creeds and in the sacramental rites, the Ordinal and Catechism of the Book of Common Prayer. For the purposes of this canon, the Book of Common Prayer and any Book of Common Prayer memorialized by General Convention are understood as sufficient statements of the doctrine of this Church.

<Proposed amended resolution text showing exact changes being made:>

IV.2.

Doctrine shall mean the basic and essential teachings of the Church and is to be found in the Canon of Holy Scripture as understood in the Apostles and Nicene Creeds and in the sacramental rites, the Ordinal and Catechism of the Book of Common Prayer. *For the purposes of this canon, the Book of Common Prayer and any Book of Common Prayer memorialized by General Convention are understood as sufficient statements of the doctrine of this Church.*

EXPLANATION

Canon IV.4.1.h.2 specifies that all members of the clergy shall refrain from “holding and teaching publicly or privately, and advisedly, any Doctrine contrary to that held by the Church.” Therefore, any addition to or amendment of “the sacramental rites, the Ordinal and Catechism of the Book of Common Prayer” has potential disciplinary implications for members of the clergy whose beliefs would no longer be reflected in the Book of Common Prayer as defined in Article X of the Constitution of the Episcopal Church. This addition would ensure that neither the emendation of the Book of Common Prayer to include a marriage service for use by opposite-sex or same-sex couples nor the alteration of the understanding of marriage presented in the Catechism to remove reference to gender would place members of the clergy who believe that marriage is a covenant between a man and a woman in violation of Title IV or their ordination vows.

A092 Access to ordination and deployment

Resolved, That the 81st General Convention amend Canon III.1 adding new sections 3 and 4 and renumbering all subsequent sections, as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (*****) to see the version showing all deleted and added text.>

III.1

Sec. 1. Each Diocese shall make provision for the affirmation and development of the ministry of all baptized persons, including:

- a. Assistance in understanding that all baptized persons are called to minister in Christ's name, to identify their gifts with the help of the Church and to serve Christ's mission at all times and in all places.
- b. Assistance in understanding that all baptized persons are called to sustain their ministries through commitment to life-long Christian formation.

Sec. 2. No person shall be denied access to the discernment process or to any process for the employment, licensing, calling, or deployment for any ministry, lay or ordained, in this Church because of race, color, ethnic origin, immigration status, national origin, sex, marital or family status (including pregnancy and child care plans), sexual orientation, gender identity and expression, disabilities or age, except as otherwise provided by these Canons. No right to employment, licensing, ordination, call, deployment, or election is hereby established.

Sec 3. No person shall be denied access to the discernment process or to any process for the employment, licensing, calling, or deployment for any ministry, lay or ordained, in this Church because of their conscientiously-held theological belief that marriage is a covenant between a man and a woman, or that marriage is a covenant between two people. No right to employment, licensing, ordination, call, deployment, or election is hereby established. In dioceses where the bishop exercising ecclesiastical authority (or, where applicable, ecclesiastical supervision) is unable, for reasons of conscientiously-held theological belief, to ordain a person who holds one of the above-named theological beliefs, the bishop exercising ecclesiastical authority (or ecclesiastical supervision) shall invite another bishop of this Church to provide access to the discernment process for ordination.

Sec. 4. No priest or deacon shall be denied licensure or canonical residence in any diocese of this Church because of their conscientiously-held theological belief that marriage is a covenant between a man and a woman, or that marriage is a covenant between two persons. No right to canonical residence or licensing is hereby established.

Sec 5. The provisions of these Canons for the admission of Candidates for the Ordination to the three Orders: Bishops, Priests and Deacons shall be equally applicable to men and women.

<Proposed amended resolution text showing exact changes being made:>

III.1

Sec. 1. Each Diocese shall make provision for the affirmation and development of the ministry of all baptized persons, including:

- a. Assistance in understanding that all baptized persons are called to minister in Christ's name, to identify their gifts with the help of the Church and to serve Christ's mission at all times and in all places.
- b. Assistance in understanding that all baptized persons are called to sustain their ministries through commitment to life-long Christian formation.

Sec. 2. No person shall be denied access to the discernment process or to any process for the employment, licensing, calling, or deployment for any ministry, lay or ordained, in this Church because of race, color, ethnic origin, immigration status, national origin, sex, marital or family status (including pregnancy and child care plans), sexual orientation, gender identity and expression, disabilities or age, except as otherwise provided by these Canons. No right to employment, licensing, ordination, call, deployment, or election is hereby established.

Sec 3. *No person shall be denied access to the discernment process or to any process for the employment, licensing, calling, or deployment for any ministry, lay or ordained, in this Church because of their conscientiously-held theological belief that marriage is a covenant between a man and a woman, or that marriage is a covenant between two people. No right to employment, licensing, ordination, call, deployment, or election is hereby established. In dioceses where the bishop exercising ecclesiastical authority (or, where applicable, ecclesiastical supervision) is unable, for reasons of conscientiously-held theological belief, to ordain a person who holds one of the above-named theological beliefs, the bishop exercising ecclesiastical authority (or ecclesiastical supervision) shall invite another bishop of this Church to provide access to the discernment process for ordination.*

Sec. 4. *No priest or deacon shall be denied licensure or canonical residence in any diocese of this Church because of their conscientiously-held theological belief that marriage is a covenant between a man and a woman, or that marriage is a covenant between two persons. No right to canonical residence or licensing is hereby established.*

~~Sec. 3.~~ **Sec 5.** The provisions of these Canons for the admission of Candidates for the Ordination to the three Orders: Bishops, Priests and Deacons shall be equally applicable to men and women.

EXPLANATION

The non-discrimination provisions of Canon III.1.2 have not been sufficient to end the perception, and often the reality, of discrimination within the discernment and employment processes of The Episcopal Church. The prohibition on discrimination based on sexual orientation or marital status is undermined in its effect insofar as it remains licit to discriminate in these protected processes on the basis of one's theological belief concerning same-sex marriage. Furthermore, we see no legitimate practical or pastoral benefit to denying access to these discernment processes on the basis of the belief that marriage is a covenant between a man and a woman. If a congregation wishes to hire or discern a call to ordination with an individual who is otherwise qualified, they should not be prevented from doing so on the grounds of a mismatch between that individual's theological belief about same-sex marriage and the theological belief of the bishop or their diocese. Section 3 would ensure genuine access to discernment processes for hiring and ordination while also providing for cases in which a bishop is unable, as a matter of conscience, to ordain someone whose theological belief regarding same-sex marriage is incompatible with their own.

Section 4 is a logical extension of Section 3. While Canon III.9.4.d provides that a priest's letters dimissory must be accepted in the absence of information "which would form grounds for canonical inquiry and proceedings under Title IV" and that letters dimissory cannot be refused "based on the applicant's race, color, ethnic origin, sex, national origin, marital status, sexual orientation, disabilities, or age," this section applies only in cases where a priest has been "called to a Cure." We do not believe that a member of the clergy's theology concerning same-sex marriage, whether for or against, constitutes legitimate grounds for canonical inquiry under Title IV. We also believe that all members of the clergy should have equal access to the process for establishing canonical residency in a diocese regardless of their beliefs concerning same-sex marriage, not only those to whom the provisions of III.9.4.d apply.

This resolution does not create or imply any right to canonical residence or licensing. It simply requires that the letters dimissory of all members of the clergy should be processed without any distinction based in their theological belief concerning same-sex marriage.

A093 Add provisions of 2018-B012 to canons

Resolved, That the 81st General Convention amend Canon I.19.3 to add a new subsection e thereto, to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

I.19.3

e. Bishops exercising ecclesiastical authority, or where appropriate ecclesiastical supervision, who hold a theological position that does not embrace marriage for same sex couples, shall in the case of remarriage after divorce, invite another bishop of this Church to oversee the consent process and to receive any report of such Marriages, as provided in Canon I.19.3.c.

<Proposed amended resolution text showing exact changes being made:>

I.19.3

e. Bishops exercising ecclesiastical authority, or where appropriate ecclesiastical supervision, who hold a theological position that does not embrace marriage for same sex couples, shall in the case of remarriage after divorce, invite another bishop of this Church to oversee the consent process and to receive any report of such Marriages, as provided in Canon I.19.3.c.

And be it further

Resolved, that Canon III.12.3.a be amended to add a new subsection 3 thereto, to read as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

III.12.3.a

3. In dioceses where the bishop exercising ecclesiastical authority (or, where applicable, ecclesiastical supervision) holds a theological position that does not embrace marriage for same-sex couples, and there is a desire to use such rites by same-sex couples in a congregation or other community of faith, the bishop exercising ecclesiastical authority (or ecclesiastical supervision) shall invite, as necessary, another bishop of this Church to provide pastoral support to the couple, the Member of the Clergy involved and the congregation or other community of faith.

<Proposed amended resolution text showing exact changes being made:>

III.12.3.a

3. In dioceses where the bishop exercising ecclesiastical authority (or, where applicable, ecclesiastical supervision) holds a theological position that does not embrace marriage for same-sex couples, and there is a desire to use such rites by same-sex couples in a congregation or other community of faith, the bishop exercising ecclesiastical authority (or ecclesiastical supervision) shall invite, as necessary, another bishop of this Church to provide pastoral support to the couple, the Member of the Clergy involved and the congregation or other community of faith.

EXPLANATION

The compromise of General Convention Resolution 2018-B012 has simultaneously ensured that same-sex couples have access to trial-use marriage liturgies in every diocese where same-sex marriage is permitted under civil law and authorized bishops to delegate their pastoral oversight in such cases when their theological convictions require it. Because those provisions are tied to the authorization of specific liturgies for trial use, they would not automatically apply if a marriage rite suitable for use by same-sex couples were to be added to the Book of Common Prayer.

Because Article X of the Constitution of the Episcopal Church provides that the Book of Common Prayer “shall be in use in all the Dioceses of this Church,” no specific canonical changes are necessary to ensure continued access to authorized marriage rites once they are incorporated into the Book of Common Prayer. This resolution formalizes those provisions of B012 concerning the responsibilities of bishops whose theology does not embrace same-sex marriage when a congregation within their diocese intends to perform same-sex marriages. As is already the case under B012, each bishop will discern the extent to which pastoral support from another bishop is necessary to ensure both the protection of their own conscience and full access for same-sex couples to authorized marriage rites.

A094 Communion Across Difference

Resolved, That the 81st General Convention directs the Presiding Bishop and President of the House of Deputies to appoint a third Task Force on Communion Across Difference consisting of not more than 12 people, who represent the cultural, generational, racial, ethnic and theological diversity in the Church, including especially members from dioceses outside the United States; and be it further

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

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

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

Resolved, That the Task Force report and make recommendations to the 82nd General Convention, ending its term at that time except by further action of General Convention; and be it further

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

EXPLANATION

In light of the serious constraints placed upon the first Task Force on Communion across Difference by the Coronavirus pandemic, the 80th General Convention directed the Presiding Bishop and the President of the House of Deputies to appoint a second iteration of that task force to continue its important work. In its explanation for its proposed resolution seeking another triennium in which to work, the original task force reported that “[m]embers of the current Task Force believe that building the kind of relationships needed to take this work further were severely hampered by the Covid-19 pandemic and our inability to meet face to face.” That observation proved to be correct. With the benefit of two in-person gatherings the Task Force on Communion across Difference was able to make remarkable

headway on the issues implicated in its mandate – and its members were able to build collegial and respectful relationships of trust and goodwill with each other.

Nevertheless, the shortened time frame available for committee work between the 80th and 81st General Conventions presented a constraint of its own. The liturgical and canonical concerns raised by this task force are unlikely to be permanently resolved by a single General Convention. The principles for a sustainable path forward that have been articulated in our Blue Book Report to this Convention will need to be fleshed out and applied to new situations. Additionally, and perhaps most importantly, the work of building relationships across difference remains crucial, and it requires more time and the contributions of more voices. The members of the second Task Force on Communion Across Difference believe that this crucial work calls for a task force to have a full triennium in which to work and pray together in person, collaborate with other interim bodies, consult with Anglicans from around the world, and reflect on all that unites us – without papering over or discounting the reality of our differences.

TASK FORCE ON DIALOGUE WITH SOUTH SUDANESE ANGLICAN DIASPORA

Members

Mathews, The Rev. Ranjit, Chair	Connecticut, I	2024
Scarfe, The Rt. Rev. Alan, Vice-Chair	Iowa, VI	2024
Blanchard, Mr. Charles,	Colorado, VI	2024
Kraus, Ms. Jackie,	Chicago, V	2024
Paul, The Rev. Michael,	North Dakota, VI	2024
Van Koevering, The Rt. Rev. Mark.	Lexington, IV	2024

Changes in Membership

The Rt. Rev. Martin Field, who had served on the Task Force from its origins, resigned from the Task Force in May 2023. He was later replaced by The Rt. Rev. Mark Van Koevering.

Representation at General Convention

Various members of the Task Force expect to attend General Convention although plans are still being made and a definitive list is not available currently.

Mandate

The Task Force on Dialogue with the South Sudanese Anglican Diaspora was formed in compliance with Resolution D088 passed by the 79th General Convention in 2018. The text of the mandating resolution follows:

2018 - D088 – Dialogue with South Sudanese Anglican Diaspora

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

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

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

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

EXTENSION OF THE TASK FORCE’S WORK:

The Task Force on Dialogue with the South Sudanese Diaspora (Task Force) was unable to complete its work prior to adjournment of the 80th General Convention, primarily due to the inability to gather as a result of the coronavirus pandemic. Consequently, the following Resolution was passed at the 80th General Convention:

2022 -A004 – Continue Task Force on Dialogue with South Sudanese Anglican Diaspora:

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

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

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

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

Summary of Work

Virtual Meetings with South Sudanese Anglican Diaspora:

During the Spring of 2022, the Task Force, with the assistance of a steering committee created by the Task Force (Steering Committee) held a series of Zoom calls with various members of the SSAD. The purpose of the calls was to hear from members of the community, including those who likely would not be able to attend the planned in-person meeting scheduled for later in the year. This also gave the Task Force an opportunity to begin to understand the issues faced by the SSAD and be better prepared for in-person discussions later.

Involvement and Importance of Steering Committee

Throughout the entire tenure of the Task Force, we have been aided immensely by the work of the Steering Committee. The Steering Committee is composed of prominent South Sudanese clergy (The Rev. Thon Moses Choi, The Rev. John Agau Deng, and The Rev. Zachariah Char) and one Anglo Episcopal priest familiar with the South Sudanese community and co-sponsor of the original Task Force resolution, The Rev. Stan Runnels. Bishop Martin Fields was also on the Steering Committee. The Steering Committee has been invaluable to the work of the Task Force and, indeed, has been significantly and substantively integral to the success of these endeavors.

In-Person Conference with SSAD Representatives:

The Task Force and the Steering Committee held a conference from October 1-3, 2022, in Kansas City, MO. There were 41 participants with 29 South Sudanese Diaspora congregation leaders, including 15 priests and 14 non-ordained persons. Participants came from dioceses representing 16 states.

Conference participants had wide-ranging conversations on various aspects relating to SSAD and their connection with The Episcopal Church generally. The primary areas of conversation revolved around:

- Theological Issues and Questions Concerning Ordination Possibilities;
- Physical Space for Worship and Community Building;
- Family Issues and Involvement of Children;
- Economic Issues and How to How Fund SSAD Clergy and Congregations;
- Understanding the Episcopal Church and How it Works; and
- Nurturing Diocesan Relationships

Bishop Alan Scarfe prepared a thorough report detailing the process and the findings from this conference. That report is included in Additional Information.

Development of a Strategic Plan:

Following the meeting in Kansas City and a review of the concerns expressed by the SSAD in attendance there, the Task Force prepared a Strategic Plan to begin to address those concerns. The plan outlines various tangible steps that should be taken including:

- Discuss with Diocesan Bishops the need to address the spiritual needs of the SSAD;
- Organize a gathering of Diocesan Bishops and South Sudanese leaders;

- Empower a South Sudanese steering committee;
- Explore way of securing funds to support SSAD theological education;
- Gather leaders of Episcopal seminaries to discuss theological issues of SSAD;
- Understand how TEC provides special assistance to minority groups; and
- Publish articles to highlight SSAD issues and related success stories.

The Rt. Rev. Martin Field presented the Strategic Plan to The House of Bishops meeting on March 12, 2023. The Strategic Plan is included in Additional Information.

Interim Bodies Meeting

The Task Force and the Steering Committee met in person from April 26-28 at the Maritime Center in Baltimore as part of the Interim Bodies Meeting. The group explored in detail what further steps were necessary to implement the Strategic Plan and the myriad of challenges that remained. As part of that exercise, The Rev. Canon Ronald C. Byrd, Jr. suggested that we utilize the Programming Evaluation Review Technique (PERT).

Statement of Understanding

During the interim Bodies meeting, members of the Task Force, the Steering Committee, and leadership of SSAD drafted a Statement of Understanding. That Statement of Understanding is set forth in italics below:

Statement of Understanding between The Episcopal Church and South Sudanese-American Episcopalians

ACKNOWLEDGMENTS

The Episcopal Church acknowledges that the South Sudanese-American Episcopalians are our siblings in Christ, baptized and members of the One Body of Christ that is the Church, and are also a unique cultural group within United States' society. The South Sudanese-American Episcopalians and their worshipping congregations acknowledge The Episcopal Church as the historic expression of Anglicanism in the United States.

DESIRES

The South Sudanese-American Episcopalians desire full incorporation into The Episcopal Church, which will be exhibited as membership for individuals, full canonical standing for clergy, and admission into union with diocesan conventions for its worshipping communities, so that we may be the Body of Christ to one another.

The Episcopal Church desires to welcome the South Sudanese-American worshipping communities into The Episcopal Church by admission into union with diocesan conventions, and The Episcopal Church also desires to welcome South Sudanese-American clergy into standing and canonical residence in its dioceses, so that we may be the Body of Christ to one another.

COMMITMENTS

The South Sudanese-Americans, as they become members of The Episcopal Church individually or congregationally, will ascribe to and follow the Constitution and Canons of the Episcopal Church and of the dioceses in which they are severally located. When they have been canonically qualified, their congregations will seek to be admitted into union with their diocesan conventions and will support the common diocesan work by their prayers and by their time, talent, and treasure. When granted standing, ordination, or reception, South Sudanese-American clergy members will give assent to the disciplines laid upon all Episcopal Clergy.

The Episcopal Church, through the ministries of the Domestic and Foreign Missionary Society—particularly the ministry of the Canon for African Descent Ministries—will coordinate and work with leaders self-selected by the South Sudanese-Americans to establish and achieve mutually beneficial goals and actions that lead to the accomplishment of these expressed desires.

Establishment of a SSAD Leadership Steering Group to Work with Office of African Descent Ministries:

Perhaps the most important suggestion recommended by the Task Force and the Steering Committee was to transfer the responsibilities of the Task Force to a South Sudanese Leadership Steering Group (SSLSG). The SSLSG would continue the work of the Task Force in coordination with TEC's Office of African Descent Ministries. The Rev. Canon Ron Byrd has graciously begun the work. The SSGSG has been organized through the good work of The Rev. Stan Runnels who will play a role with the group going forward. The SSLSG is comprised of seven SSAD leaders, selected to lead these efforts by their peers. The Task Force envisions that it will continue to assist the SSLSG through the 81st General Convention, at which time its work will be largely complete.

Supplementary Materials

Kansas City Report

Introduction

At the General Convention in Austin in 2018, a resolution was passed to develop a comprehensive conversation between The Episcopal Church and the Church leaders of the South Sudanese Diaspora. A Task Force consisting of two Bishops (Alan Scarfe and Martin Field), two clergy (Ranjit Mathews and Michael Paul) and two lay deputies (Jackie Krause and Buck Blanchard) was established with a report back to General Convention expected in 2021. The Task Force set out to enlist congregational leaders, initially clergy and later expanded to include lay leaders, among the South Sudanese Anglican communities across the United States. This task revealed that we had no central directory of such communities across the Episcopal dioceses and proved that communication on such a scale was not easily available. The Task Force created a Steering Committee composed of prominent South Sudanese clergy (The Revd. Thon Moses Chol, The Revd. John Agau Deng, and The Revd. Zechariah Char) and one Anglo Episcopal priest familiar with the South Sudanese community and a co-sponsor of the resolution, The Revd. Stan Runnels. Bishop Martin Fields was also on the Steering Committee.

The aim of the Task Force was to host a Conference for the conversation in time to report back to General Convention for next steps. With the arrival of the pandemic, scheduled Conferences were postponed at least twice, and finally made possible at the beginning of October (1-3, 2022) in Kansas City. By that time the postponed General Convention had been held. The Task Force made a written report of actions thus far for the Blue Book; and offered a new resolution for the continuation of the Task Force's work for the new biennial. During the postponements of the scheduled Conferences, the Task Force managed to hold regional zoom conversations with South Sudanese leaders, and a Day zoom Conference to begin our work, and to maintain momentum and interest among the South Sudanese. The Task Force was pleased to see that General Convention in Baltimore voted to continue the work through Resolution A004. The Task Force is also grateful to the Missioner of the African Descent Ministries, Ron Byrd, for his support throughout the process leading up to the Conference. We see his department as having a vital role in the ongoing relationship of The Episcopal Church with the South Sudanese Anglican Diaspora. The presence and contribution of the Officer for African Partnerships, Daniel Karanja, at the Conference was also greatly appreciated.

In the end there were forty-one participants within the Conference with twenty-nine South Sudanese Diaspora congregational leaders, including fifteen priests and fourteen non-ordained persons (as well as the three South Sudanese members of the Steering Committee and the one member of the Task Force). They came from dioceses representing Tennessee, Washington, Virginia, Iowa, Minnesota, Utah, Illinois, Massachusetts, Missouri, Kentucky, Arizona, New York, Oklahoma, Nebraska, South Dakota and Georgia.

An overview of the agenda at the Conference in Kansas City, October 1-3, 2022

The sessions were opened with video greetings from the Presiding Bishop and the President of the House of Deputies, and with an explanation from the Task Force Chair, Ranjit Mathews, on how we had arrived at this place. Worship and prayer were vital parts of every session, led by South Sudanese members of the Steering Committee. Eucharist was celebrated at the start of the first full day of sessions, which was a Sunday. Conversations were held in small groups of six to eight people, facilitated by members of the Steering Committee who were South Sudanese except for one group. The Task Force members were placed as listeners and note-takers among the groups. Initial questions gave opportunity for participants to tell their faith stories, especially pertaining to their arrival in the United States and how their faith sustained them. They were specifically asked about attachment to the Anglican tradition. A second round of conversations centered around challenges and frustrations in being connected with The Episcopal Church. The Task Force held a plenary session to give feedback on what they had been hearing, and asked for further clarification, and for issues not yet heard. In turn each break out group offered their top three learnings so far. Throughout the agenda, from time to time, the South Sudanese held South Sudanese only sessions for their own assessment purposes on the Conversations.

In the evening of the first full day, we heard from The Episcopal Church Africa Partnership Officer and on behalf of the Missioner for African Descent Ministries, from the Director of AFRECES, Richard Jones, and from representatives of Seminaries working on alternative formation processes, Bishop Tengtenga from the School of Theology in Sewanee, and Bishop Fields representing the work of Bishop Kemper School for Ministry. The third round of conversations was held on the next morning, focusing on two or three most important objectives or needs to bring forward. These were shared at a final plenary session, in which the Task Force also explained avenues for the continuous work stemming from the Conference. Three areas were highlighted: report of the Conference will be presented in the Blue Book for the 2024 General Convention Blue Book; issues raised will form work objectives for the newly appointed Task Force from the 2022 Resolution; and cooperation will continue with the Office for African Descent Ministries.

Report on the Conversations

Before condensing the rich and honest conversations into their six essential themes, it must be stressed how important the Anglican tradition, and worshipping with fellow Anglicans/Episcopalians in Episcopal spaces was to every South Sudanese at the Conference. Testimony after testimony confirmed this. “It is one of the oldest churches in South Sudan and Sudan. It is what makes us who we are. Part of our foundation of faith is back home and always will be. We keep to Anglican tradition as our connection with back home “. “Our first Christianity is Episcopalianism, like our fathers and mothers”. “Most lost boys are again lost to other denominations and away from the Episcopal Church

in which they were baptized. This is painful”. “South Sudanese pay attention to theological background and tradition. They love the Anglican way”.

This embracing of the Anglican way is profound and significant when we look at the prevailing issues that arose in the conversation of the South Sudanese diaspora congregational leaders as to their relationship with The Episcopal Church. Those issues are presented in six areas.

- 1) **Theological Issues:** As stated, the diaspora want to be Episcopalian because they need to stay connected to God, and this is the tradition in which they were brought to faith. They do not want to change their Episcopal roots. Worshiping in a Lutheran or Disciples or Pentecostal space feels foreign to them. They wonder if US Episcopalians truly understand them to be Episcopalians too. One woman commented that she is ordained to be a local priest, but she wants to be sure that her son, if he should be so called, will have the same chance to fulfil that call as anyone else.

For the South Sudanese, call to ministry, including ordained ministry, comes before formation. Several of their leaders practiced ministry in the camps, or in communities gathered along the way to the United States. A few were ordained in South Sudan and have trouble having their credentials approved by The Episcopal Church or, as in one case, even by the Lutheran authorities in whose church his community has found worship space. This is frustrating. They recognize that South Sudanese Bishops complicate matters by calling individuals home for ordination and sending them back to minister as priests or deacons to their diaspora congregation. It was noted that there needs to be clear conversation between diocesan bishops and South Sudanese bishops on this matter. It is a discussion, however, that needs to be carried out in a spirit of common mission and pastoral care for the diaspora, and not simply concern ecclesiastical boundaries.

It was obvious that there was much confusion and ignorance about how The Episcopal Church system works regarding discernment for ordination and for deployment of the ordained. For ordained South Sudanese the only posts that seem open, and for which those in process are being trained, seems to be non-stipendiary or bi-vocational positions. Many Church leaders are holding down two or three jobs to sustain their families, and pastoral services suffer from lack of time and energy.

It was expressed that the discernment and deployment process need to acknowledge the differences in language and culture between Western raised people and those from South Sudan (We have heard of this issue also among Indigenous people in the United States). There was a definite unanimity in the desire of the South Sudanese Anglican clergy to have full acceptance and unquestioned Holy Orders in The Episcopal Church. They are very concerned about working with and getting through TEC’s diocesan program of discernment for Holy Orders. This is coupled with their concern about making their way through the educational requirement expected of those preparing for TEC ordination. It was asked that The Episcopal Church, in particular the House of

Bishops, and local dioceses consider alternative processes for ordination preparation for the near term to allow South Sudanese Diaspora to thrive and grow. They found education too rigorous for some and asked for a hybrid model. They expect some recognition of the education they have already received in South Sudan. All of this is stated in the light of a concern about acquiring enough priests to serve the growing number of South Sudanese churches and their growing families.

- 2) **Physical space:** To find a way to house South Sudanese Diaspora communities in Episcopal congregations seems a first order of business. That as Anglican siblings, they have spent years trying to find places to worship when almost every community they are in has TEC resources that should be offered to them for use seems a colossal failure of imagination and hospitality on local Dioceses and congregations. The House of Bishops needs to talk about this issue and find ways to encourage local leadership to be more welcoming. “We have a witness of staying the faith course through difficult times. We ask – are we children of God? Are we part of the worldwide Anglican communion? Are we not part of Christ? We have been suffering since 1954 and lost 2.5 million people. We have not found help as believers from other Christians, and yet it has not pushed us to lose faith”. “If General Convention passes resolutions – why don’t we (TEC) pay attention and live up to it? How can people be turned away?”

Unfortunately, this has been many groups experience. Sometimes hospitality depends upon the whim of the Rector and can become precarious at times of transition. It follows that the congregations need official recognition and clear membership in the life of the local diocese. They need to know their bishop and to have their bishop pay attention to them. They count on their “Father/Mother in God” to be the instrument of unity between their congregation and the diocese.

In addition, mention was made of the possibility of using old churches, no longer in use, for South Sudanese congregations; and for seeking optimum times on Sunday morning for worship. Often, they are given late afternoons. South Sudanese enjoy the church as a place of social interaction. It is important to them. As is their own style of worship which involves much singing. As one Bishop once said, “The Hymnal is your Bible”. They have very much grown in faith through the words of hymns and by singing.

- 3) **Family issues:** As an immigrant/refugee community the South Sudanese Diaspora struggles mightily with family issues. This was raised throughout the conversations. They are aware that often their large children population puts a strain on the relationships with local congregations in sharing space. They asked for help in teaching their children a more disciplined approach to being at church. The South Sudanese diaspora wants their children to grow in the Anglican faith. They see this as a bulwark against loss of purpose and unruliness. Parents are often at a disadvantage, with both parents working, and with their children drinking in western culture faster than

themselves. They don't want them to lose their native languages. Sunday School is a vital program for them, especially training for Sunday School teachers, which often would be a priority in their dioceses back home. They do not see resources as readily available, or within their financial capacity. They seek lessons in civic ways to be able to survive and flourish in the United States. There is an intense desire to transmit the faith to their children and their next generation. Godly Play was mentioned as something they would like to get access to more broadly. In some cases, children outnumber adults in the congregation, but they do not have financial or programming resources. They want their children to be welcomed in Episcopal Churches, not seen as a nuisance. The non-stipendiary status of the clergy means that they cannot undertake additional programming for the children. Resources for the development of women in leadership was also mentioned. And South Sudanese men were challenged by the women to consider that it might not always be them who need time from the children to assume leadership roles. It was noted that there were examples of distress through PTSD, and marriage breakdowns are happening impacting the family system. This raised the question of access to mental health resources as something The Episcopal Church could assist.

“How do we help our children learn the faith at the family level until becoming believers in their own right. The process is no longer there as we had it back home. Children and parents get distracted. Kids get sidetracked and don't follow their parents.” “Ministry to children and young people is weak. We need trained teachers among the South Sudanese. Resources are not so readily available, and programs are deemed boring. There is a need for financial resources for Church programs, including summer camp fees or scholarships for example.

- 4) **Economic Issues:** Scholarships for children and especially young adults to get education at Episcopal Schools or colleges was another primary focus. Clergy also are highly desirous of financial support from diocesan and general church wide structures and believe such support would allow them to invest more time in their pastoral duties and less in earning a living. Using the old English term, they need a “living” because they see so much ministry going undone because they must work a secular job. They called for a financial reprioritization in dioceses to enable assistance with scholarships for young adults to attend theological school, or to help them train in vocational schools even if it was to return to work in South Sudan. There was an interest in having discretionary funds for work in their communities. In general, they challenged the local churches to work with the South Sudanese in providing guidance and resources on how to plug into US agencies and opportunity centers that are there to “help you live”. They seek brothers and sisters who live alongside them and help them integrate into the system.
- 5) **Understanding The Episcopal Church and how it works:** We heard often that the South Sudanese Diaspora do not fully understand The Episcopal Church system. Clearly the House of Bishops and The Episcopal Church leadership must create mechanisms for them to better understand The Episcopal Church polity and administration both at the local/diocesan level as well as the church-

wide level. The South Sudanese Diaspora want to collaborate as partners but are frustrated by our systems. There was a wondering as to whether they should be organized along the lines of the Liberian Episcopal Church USA. Mostly, however, the South Sudanese Diaspora as Anglicans want to know how to become integrated into The Episcopal Church on every level. The United States still feels a strange culture even after two decades, and their sense of belonging in The Episcopal Church can assist in overcoming this.

They asked if there was a newsletter that came out of the Office for African Descent Ministries to which they could contribute, and that perhaps their stories, particularly their successes could be featured more in ENS. One question raised was that “at the top, the dioceses have their own autonomy and so there is no national uniformity. Nothing nationally creates greater uniformity”. How do we dig deeper to think through these two systems?

- 6) **Nurturing Diocesan Relationships:** Much of what we heard hinges on the nurturing of good diocesan relationships, especially Bishop to South Sudanese Diaspora congregations and their clergy leadership. It requires a better awareness and level of engagement by local bishops. The General Convention office and other offices of The Episcopal Church may need to create process and procedures for assisting local bishops in matters regarding refugee communities that share a faith base with us. The House of Bishops needs to establish a shared protocol and methods for better engaging the South Sudanese Diaspora nationwide. This may begin with a healthy, affirmative interest in the South Sudanese community and a strong message that “you belong here”. Priests need to be treated as priests in their diocesan authorities and not simply as “local South Sudanese clergy”. Encouraging their involvement in Annual Convention or other faith formation programs or developing South Sudanese liaison committees to meet with the bishop.

We return to the issue of financial resources as part of this relationship. How can we help at diocesan level to subsidize clergy for their ministry, and ease their dependence on having to hold multiple jobs? Can the Diocese focus on the training of young South Sudanese – the next generation – who are interested in the priesthood, and create financially sustainable or supported resourcing? Clearly engaging and moving forward toward meeting concerns and priorities that came to light in the conversations hinges on the willingness and availability of TEC bishops and the diocesan structures to connect with them and the South Sudanese Diaspora and their congregations. The conversations indicated that there a very mixed result on this across The Episcopal Church. “The fact that The Episcopal Church has begun to think of inclusion of South Sudanese and their challenges is the beginning to a solution. Let us not leave the conversation and regret not approaching to resolution”, was the concluding remark of one participant.

Some Final threads

The participants from the South Sudanese Diaspora were clear that there remained the question of their relationships with Dioceses back home, and especially how this affected TEC Diocesan Bishops. We were asked to reckon how this impacts their life and relations here and how it effects the ability to support themselves. The question was raised: how do we smooth out these issues to promote growth and better relationships? It is not realistic to expect the Diaspora not to care for their people back home; and in fact they would like to become strong communities so as to support better their people in South Sudan. All of this is seen as a fruit of a solid integration within The Episcopal Church. Likewise, they are a mission-minded people, and see their lives as witnesses to the Lord Jesus Christ. As one person said “The Church is dying everywhere in the world. We need to raise up new generations of faith. The South Sudanese have this issue” They are co-laborers in the field where Jesus says it is white for harvest.

Finally, we learned of one surprising project that has been undertaken by a young man from Atlanta for several years. Every October and November, he translates the Old Testament readings for the upcoming year’s lectionary into Dinka. He develops one hundred and fifty pages of translation. He combines these with the New Testament passages which are already translated elsewhere and sends out the readings for the upcoming year to as many Dinka congregations he can find. He aims each year to do this by Christ the King Sunday. He has sought for quite some time a software that might help him upload his translation and have them more readily at hand for people. This seems like a low hanging fruit for The Episcopal Church to come alongside and assist.

We also learned of an elder priest, ordained in South Sudan and at one time an Archdeacon over territories that have since become dioceses. He trained many of those who later became bishops and has baptized many of the lost boys. It was clear as he entered the Conference room, there was respect and honor for him among the participants. Almost to a person. He had come to the United States and settled, could not find a home among Episcopalians and served in a South Sudanese congregation in a Lutheran church where his priesthood was not recognized by the Lutherans. He knows little English and did not know the local Bishop. Another low hanging fruit was to connect him with that Bishop before the Conference ended, as we were able to do.

It was an incredible honor to be listeners as Task Force members to a people of faith who trusted us with their stories, their lives of struggle and faith, and even the difficulties which they continue to face. This is a proud people, a deeply devoted people, a people who are Anglican, a living example of that Episcopal expression of the Jesus Movement. They may not share our position on LGBTQ issues and were open to admit that; they may compare their love of the Anglican way as they notice TEC interests in battling US racism, identity inclusion, economic structures, materialism and consumerism; and maybe express a difference in that emphasis, but they present themselves as our brothers and sisters in Christ and they want their children to be able to do the same. This is the body of Christ at work.

Task Forth on South Sudanese Diaspora – Strategic Plan

At the General Convention in 2018, a resolution was passed to develop a comprehensive conversation between The Episcopal Church and the Church leaders of the South Sudanese Diaspora (“SSD”). A Task Force was established with a report back to General Convention expected in 2021. The aim of the Task Force was to host a Conference to listen to the concerns and suggestions of South Sudanese congregational leaders. Due to the pandemic, the Conference was postponed at least twice but finally took place in Kansas City October 1-3, 2022.

A full report of the findings coming out of the Conference is attached. Those findings identified areas of concerns and how The Episcopal Church might respond to the needs of the South Sudanese Diaspora. Please refer to the attached report for a comprehensive discussion of those issues.

At General Convention 2022, a resolution was passed extending the work of the Task Force during the upcoming biennial. Below is an outline of the Strategic Plan recommended by the Task Force to make tangible steps during this biennial to affirmatively address the needs and concerns of the South Sudanese Diaspora.

The Committee is asking for \$50,000 for meeting needs, specifically for item two.

- 1. Discuss With Diocesan Bishops the need to address the spiritual needs of the South Sudanese diaspora.**
 - a. Start with a few Bishops, perhaps six dioceses with large SSD populations
 - b. Steering Committee and Task Force pick best dioceses (and bishops) to start
 - c. Circulate Bp. Scarfe’s conference summary to these bishops (also all conference participants)
 - d. Try to pick dioceses from which some conference attendees came
 - e. Get help from the office of Africa descent ministry and share information through that hub
 - f. Arrange meetings with Bishops and staff and several SSDs, just so Bishops listen
 - g. Arrange for South Sudanese to be speakers at Diocesan Conventions and HOB.
 - h. Have SSD congregations tell success stories at Diocesan Conventions
 - i. Have SSD communities in various dioceses set up tables with materials, etc.
 - j. Have SSD community sing a hymn as part of worship at Diocesan Convention
 - k. Get an SSD member if front of HOB somehow

2. Organize a gathering of Diocesan Bishops and South Sudanese leaders in dioceses with large South Sudanese Diaspora populations.

- a. This step would come after #1 above
- b. Have an in-person gathering, maybe with a few more bishops and SSDs, but still small
- c. Funding from Task Force budget plus some from Office of African Descent, if possible
- d. Identify specific steps that dioceses and SSD communities will take together
- e. Report out from that meeting to Diocesan conventions and HOB

3. Empower South Sudanese steering committee (October 2022 conference) w/ Rev. Stan Runnels as consultant

Primary Objectives:

a. Explore physical Space:

- i. Maybe select a few properties to try to convert to South Sudanese churches.
- ii. Find a few properties that have been, or could be, turned over to SSD congregations
- iii. Tell their stories in diocesan newsletters and ENS
- iv. Show that there can be success stories – solicit brief summaries of these successes
- v. Also tell stories of SSD congregations sharing space successfully, perhaps with Diocesan support

b. Develop specialized formation training for members of the SSD (including children).

- i. This could involve staff members from TEC, formation leaders at the Diocesan level and organizations like FORMA. Solicit descriptions of Iona model working with potential deacons and clergy (e.g., North Dakota, Upper Michigan, Seminary of Southwest)
- ii. Offer classes locally so folks can still work to earn a living
- iii. Invite bishops (including retired ones) who have implemented these programs to be part of the discussion group (e.g., Bp. Michael Smith?)
- iv. Specifically target SSD communities/congregations for focused formation assistance
- v. Find funding to introduce (or enhance) Godly Play at several congregations across several dioceses; start with a few as models

- c. **Develop a comprehensive list of South Sudanese congregations worshipping as Episcopalians or otherwise in the Anglican Tradition.** (with office of Africa descent Ministries)
 - i. Start with Steering Committee list
 - ii. Add list from AFRECs, GEMN, EPN and TEC
 - iii. Vet with newly appointed “International Mission Advocates” in each diocese
 - iv. Appoint a point person or persons to be sure that we develop a comprehensive list
4. **Explore ways of securing funds at the TEC or diocesan level to support theological education.**
 - a. Don’t have to educate everyone right now – so consider pilot programs.
 - b. Perhaps take the dioceses with the most interest and have them identify one or two candidates each (question of affordability)
 - c. Are seminaries able to give scholarships?
 - d. Solicit descriptions of dioceses who have funded, at any level, education for members of the SSD community (e.g., funding to help lay leaders advance, stipends for clergy)
5. **Call for a gathering of leaders of the various Episcopal Seminaries to discuss theological issues concerning South Sudanese Diaspora. Who? When? How to get them interested in this effort?**
 - a. Arrange a Zoom call with seminary representatives and select SSDs
 - b. Small group to start
 - c. Have seminaries briefly describe creative education models they have previously developed and circulate widely
 - d. Better understand Iona model, who has used it and what works or not
6. **Better understand how TEC provides special assistance to the Latino, Native American, Black and other minority groups (with office of Africa Descent Ministries)**
 - a. Is there a way to replicate those efforts?
 - b. Some dioceses have part-time ministers for the Latino community, for example; Could we find one or two dioceses to experiment with that for their SSD congregations?

- c. Continue to remember that SSD's came from Episcopal background; other minorities perhaps less so
 - d. Solicit descriptions of dioceses/individuals who have successfully advanced these programs
- 7. Start a focused effort to publish articles highlighting these issues – and related success stories – in Diocesan newsletters and ENS.**
- a. Goal of two stories in ENS in 2023 and a story in every (with a sizable SSD community) diocesan newsletter, sometime during 2023, describing the South Sudanese community there and its efforts, goals, and successes.

TASK FORCE ON IMAGINING A CHURCH GROUNDED IN SOCIAL JUSTICE AS CHRISTIAN MINISTRY

Members

The Rt. Rev. Marc Andrus, Chair	California, VIII	2024
Drew Abbott	Southern Ohio, V	2024
The Rev. Dr. Teresa Danieleley	Missouri, V	2024
Dr. Victor A. Feliberty-Ruberte	Puerto Rico, II	2024
Ms. Caitlin Frazier	Washington, III	2024
Rev. Canon Dr. Robin Hollis, Ahe	Arizona, VIII	2024
Ms. Sarah Lawton	California, VIII	2024
Chris Leung	Western Massachusetts, I	2024
Lindsey Lewis	Idaho, VIII	2024
Mr. Alan Murray	Oregon, VIII	2024
Mr. Byron Rushing	Massachusetts, I	2024
Ms. Felicity Thompson	Michigan, V	2024
The Venerable Rena Turnham	Minnesota, VI	2024

Changes in Membership

There have been no changes in membership since this task force began meeting in January 2023. We did celebrate the successful completion of the senior seminary year of Ms. Caitlin Frazier, VTS and Ms. Felicity Thompson's 1st full year of seminary. We also celebrated the awarding of Honorary Canon for The Rev Dr Robin Hollis, Deacon, Arizona.

Meetings

The task force met as a whole five times via Zoom: January 31, 2023, February 28, 2023, May 16, 2023, July 25, 2023, and September 27, 2023. The task force also met in person at the Maritime Center in Maryland from April 24-26, 2023 and from October 9-11, 2023. Sub-groups regarding analysis and drafts continued in November and December.

Representation at General Convention

Bishop Marc Andrus and Deputy Sarah Lawton (California) are authorized to receive non-substantive amendments to this Report at the General Convention.

Acknowledgements

The committee is indebted to Mr. Matt Duke, Executive Assistant to Bishop Marc Andrus in the Diocese of California, for his assistance with our work. We are also very grateful to all the people across The Episcopal Church who took the time to meet with us in our focus groups and interviews (as described below). Your vision and your ministries are an inspiration to all of us.

Mandate

80th General Convention resolution 2022:

A078 Imagining a Church Grounded in Social Justice as Christian Ministry

Resolved, That the 80th General Convention affirm:

- 1) That social justice advocacy is a primary ministry of the Church; it is our corporate, public witness to the Mission of God “to restore all people to the unity of God and each other in Christ.” [BCP Catechism, page 855].
- 2) That social justice is about right relationships among and between all of us, centering the voice and experience of the marginalized (as we read in Matthew 25), and these are the relationships that have been, and continue to be, harmed by the systemic, unjust distribution of wealth, opportunity, and privilege.
- 3) That social justice ministry includes acts of mercy or charity but also must include dismantling institutions, structures, and policies that cause harm and divide us from each other; and it includes repairing the breach by rebuilding systems of justice, fairness, and equity (Isaiah 58);
- 4) Over this past triennium, (2018-2021) the global pandemic, racial justice uprisings, and

escalation of the climate crisis including extreme wildfires and storms, as well as the societal fissures and institutional failures that these events have revealed, demand we understand this to be a revolutionary moment of accountability, repentance, and renewed commitments to the mission of God. We are called to account for our failures to live the words we preach and pray. We acknowledge that historical practices, policies, and structures of the institutional church have played a role in the persistence of systemic inequality and call out for out for immediate, urgent and enduring redress.

And be it further,

Resolved, That all dioceses and congregations be called upon to ground every planning or business meeting or convention with prayers inviting an examination of conscience regarding the specific

impact of the decisions of such meetings upon those who are poor, dispossessed, disadvantaged, or marginalized, and to provide and model forms for such examination of conscience. And be it further,

Resolved, That all dioceses be called upon to offer, at least once a year, a diocesan-wide event or program and liturgy to engage our congregations and members in listening to and understanding the history and current context of our diverse local communities, with attention to those who have historically been dispossessed or disadvantaged; And be it further,

Resolved, That this General Convention direct the creation of a Task Force on Imagining a Church Grounded in Social Justice as Christian Ministry be formed as a diverse group to include 2 bishops, 2 priests, 2 deacons, and 10 laypersons, in order to a) consider what the church must look like if we put our vocation to love our neighbor and to be repairers of the breach at the center of our work; b) to reach out to local and diocesan groups that are doing social justice and racial reconciliation work focused on systemic change, in order to understand what resources and gifts we already have in this work and where the gaps are; c) to liaise with the Standing Commission on Liturgy and Music and the Standing Commission on Governance, Structure, Constitution and Canons, the Presiding Officers' Advisory Group on Beloved Community Implementation (if it is extended in the next triennium), and other relevant interim bodies on consideration of these questions and how to address the institutional barriers to change in the church; and d) be charged with making recommendations to the 81st General Convention for institutional change to support social justice as Christian ministry in the areas of governance and structure, prayer and liturgy, catechesis and lifelong formation for discipleship, especially with laypeople and consistent with an equitable and inclusive polity." And be it further,

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$55,000 for the implementation of this resolution."

This Resolution proceeded from 2018-A056 *Create Task Force on the Theology of Social Justice Advocacy as Christian Justice* which in turn was created by a resolution offered by the House of Deputies' Committee on the State of the Church in 2018. The current task force can be seen as the latest iteration of an inquiry that has been happening in various forms since 2015.

Summary of Work

Overview of Work

The Task Force on the Theology of Social Justice Advocacy as Christian Ministry (2018-2021), provided the theological grounding for our work together in 2023. Ms. Sarah Lawton, Chair of the 2021 Task Force and member of this current task force, provided additional insights into their report to the 80th General Convention as well as the reflection on the terms “Social Justice”, “Advocacy,” and “Political,” concluding with the statement “Social Justice advocacy is core to the church’s mission.” The full report can be found in “*The Episcopal Church Reports to the 80th General Convention Otherwise known as The Blue Book Volume 3 page 938*”. Below are excerpts from that report that set the foundation for this task force to move forward.

Social Justice

The term “social” can refer to how society is organized, to companionship, or to an event at which people gather. It is about interaction with others and therefore always about relationships. In the Christian vision, the term “justice” does not only pertain to the law, but has to do with what is morally right: equity, fairness, dignity, and right relationship.

Since the Episcopal Church has devoted time and resources to deepening and living into building out our understanding of The Rev. Dr. Martin Luther King, Jr.’s vision of “Becoming Beloved Community,” his view of justice is particularly relevant. Dr. King wrote to white church leaders in 1963 in his Letter from the Birmingham City Jail that “injustice anywhere is a threat to justice everywhere.” He taught that justice could not be parceled out to individuals or groups; it is the birthright of every human being.

Advocacy

Advocacy has been described as “a social change process affecting attitudes, social relationships and power relations, which strengthens civil society and opens up democratic spaces.”¹ It consists of coordination, strategic thinking, information, communication, outreach and mobilization. It can be as simple as speaking up for another.

There can be a political aspect to advocacy, but there isn’t always. In fact, from the Latin “advocare” means ‘to call out for support.’ Like social justice, advocacy is a continuum: working to change public

¹ Handbook from Save the Children Fund, as quoted in the Culture and Creativity Programme of the European Union. <https://www.culturepartnership.eu/en/publishing/advocacy-course/what-is-advocacy>, accessed January 4, 2021.

policy for the public good,² advocacy can change public opinion and, likewise, affecting public opinion may lead to policy change.

(Please Note: framework and concepts in this section attributed to Anush Begloian.)³

Political

In turn, the word “political” is often confused with “partisan.” “Political” comes from the Greek (“polis,” meaning “affairs of the cities”), and does not equate with partisan. Politics means the set of activities for governing an area. Our church engages in politics when we bring our ethics and moral views into public conversations and deliberations about how our cities, towns, nations, and institutions are governed. We engage in politics when we ask: Who benefits from things as they are? Who is left out? How are the marginalized and most vulnerable affected by the action we are considering or the inaction we are tolerating that perpetuates things as they are?

Social Justice advocacy is core to the church’s mission .

The *Task Force On Theology Of Social Justice Advocacy* asserts that social justice advocacy is distinct from partisanship (though it may include supporting candidates or causes endorsed by a political party). Social justice advocacy is rooted in our moral tradition and our experience of Christ’s death with us to sin and our hope of a risen life with him. Social justice advocacy is giving a public witness—through word and deed—to our biblical imperative to demonstrate our love for our neighbors. Therefore, social justice advocacy is a central, not a peripheral or optional, manifestation of Christian discipleship.⁴

Implications for the Current Task Force 2023 Workplan

As of February 2023, the starting point for this current task force is grounded in the resulting conclusion from the 2021 Task Force’s work. That conclusion is that **“Social justice advocacy is giving a public witness - through word and deed - to our biblical imperative to demonstrate our love for our neighbors. Therefore, social justice advocacy is a central, not a peripheral or optional, manifestation of Christian discipleship”**.

² Here, as elsewhere, we hold the very concept of ‘public good’ up to the light: who defines it? Who constitutes the ‘public’? Who decides what is ‘good’?

³ Anush Begloian, International Expert on Advocacy and Communications of European Union-Eastern Partnership “Culture and Creativity” Programme in Ukraine, Belarus and Moldova, 2016-2017, video lecture, “What Is Advocacy and How Can It Help?,” <https://www.culturepartnership.eu/en/publishing/advocacy-course/what-is-advocacy> , accessed January 4, 2021.

⁴ Report of the Task Force on Theology of Social Justice Advocacy to the 80th General Convention of the Episcopal Church, p. 938-956, <https://extranet.generalconvention.org/staff/files/download/30555>, accessed November 17, 2023.

Using the lens of the previous Task Force and reports, the 2023 Task Force reevaluated the Mandate understanding that the function and focus is enumerated in the plank outlining the deliverable of a Task Force. Hence the 2023 Task Force is to address four main areas:

- a) **consider what the church must look like if we put our vocation to love our neighbor and to be repairers of the breach at the center of our work,**
- b) **...reach out to local and diocesan groups that are doing social justice and racial reconciliation work focused on systemic change, in order to understand what resources and gifts we already have in this work and where the gaps are,**
- c) **...liaise with the Standing Commission on Liturgy and Music and the Standing Commission on Governance, Structure, Constitution and Canons, the Presiding Officers' Advisory Group on Beloved Community Implementation (if it is extended in the next triennium), and other relevant interim bodies on consideration of these questions and how to address the institutional barriers to change in the church,**
- d) **be charged with making recommendations to the 81st General Convention for institutional change to support social justice as Christian ministry in the areas of governance and structure, prayer and liturgy, catechesis, and lifelong formation for discipleship, especially with laypeople and consistent with an equitable and inclusive polity.**

In building out the workplan to support the mandate, the scope of the activities and the subsequent actions required to support those, it was identified that the time needed was determined to be greater than the time available. Due to the abbreviated time to work together (February - November 2023), the Task Force adjusted the workplan to reflect the shortened timeframe. In addition to developing a timeline, The Task Force initiated two simultaneous strategies:

1. The first, with a small sub-group under the leadership of Mr. Alan Murray (Oregon) and Dr. Victor A. Feliberty-Ruberte,(Puerto Rico) was to identify, review, and share with the full Task Force all General Convention Resolutions related to social justice. The outcome is to look for themes, trends, and actionable goals as to how to inform on social justice as ministries.
2. The second was to conduct focus groups and/or individual interviews. This strategy grew out of various meetings with various church groups as to the most effective and efficient way to learn about Justice as Christian Ministry in the Episcopal Church.

Strategy #1:

Review of Past Resolutions Related to the Social Justice as Christian Ministry

The Task Force reviewed all previous General Convention resolutions dated back to 1973 calling the church to engage social justice as part of Christian ministry. Notably, as of 1985, these resolutions called for the development of models of advocacy for justice for the poor (1985-A107); authorizing

committee on Justice, Peace and Integrity of Creation (1997-A036); to encourage broad coalition for nonviolent social change (1985-A077). In subsequent General Conventions, there was a renewal of commitment to alleviate poverty and injustice (2012-A135) and to affirm relationships in approaches to social justice ministry (2015-A096).

In 2018, the General Convention continued to call for the development of grassroots social justice advocacy and network (2018-D071 and 2018-A057), This momentum led to the call to create a Task Force on the Theology of Social Justice Advocacy as Christian Ministry in 2018-A056 and finally in 2022, the passage of A078 Imagining a Church Grounded in Social Justice as Christian Ministry that enables to create this particular 2023 task force.

Over the course of the life of this task force, the team has actively sought out meetings with various church groups to further the understanding of intersections with social justice. These meetings continued to provide the scaffolding for moving forward with more in-depth understanding via focus groups, interviews, and stories.

During the October 2023 convening session, the team continued to reference and review adjacency resolutions, commissions' work, and task forces. As per the specific actions listed in the mandate under (b) and (c), this Task Force identified and established relationships with the following:

- **The Executive Council Committee on Anti-Racism (ECCAR)** including the need for collaborative activities.
- **Task Force on LGBTQ+ Inclusion** chaired by The Rev. Canon Susan Russell
- The Episcopal Church **Standing Commission on Liturgy and Music (SCLM)**;
- Task Force on **the Care of Creation and Environmental Racism**

Strategy #2:

Data Gathering and Collection from Key Ministries and Individuals Utilizing Focus Groups and Interviews

Under the guidance and leadership of The Rev. Dr. Teresa Danieleley (Missouri), the Task Force members determined the ministries and key convenors to be interviewed. The Rev. Dr. Danieleley created not only a Google drive for the Task Force to access but also a group spreadsheet to track and monitor those ministries/groups/individuals identified to provide insights, needs, challenges, and suggestions.

Methodology and Qualitative Analysis

Once the target groups/individuals were identified, the team created and utilized an Interview Protocol to ensure consistency and outcome integrity. This allowed the Task Force members to have a common process for focus groups and interviewees to assist with data gathering and to also inform

on trends. These questions, developed by The Rev. Canon Dr. Deacon Robin Hollis (Arizona) and agreed to by the Task Force, guided our Focus Groups and Interviews. This protocol and the Interview Process was also to be available in Spanish. However, the need for translation was not required in this first round. The interview protocol used is shared below:

1. What are your main justice ministries?
2. How did you come to engage in these ministries?
3. How long have you been engaged in your main justice ministries?
4. Have priorities and foci for justice ministries shifted over time? If so, how did that happen?
5. How is the enthusiasm for your justice ministries maintained? How is the story of why these ministries are important carried forward through leadership changes?
6. What have you heard from other members of this focus group that surprises or inspires you? What would you like to know more about from other members of this group?
7. What role does imagination play in maintaining your engagement in justice?
8. What would you like to say to the Episcopal Church about creating a church whose life is based on and centered in justice?
9. Is there anything you'd like to share that we have not asked?

The process developed had a minimum of two Task Force members (while utilizing the common Interview Protocol) with one asking questions and facilitating conversation amongst the participants. The other Task Force member typed notes, in addition to enabling the ZOOM recording and the ZOOM transcript.

Given the abbreviated timeframe, only four Focus Groups and two interviews were conducted. The Focus Groups included were Housing, Reparations, Creation Care & a more general Congregations group along with separate interviews with the Arizona Diocese Prison Ministry Convenor. A qualitative framework developed and applied by Dr. Victor A. Feliberty-Ruberte (Puerto Rico) provided rubrics for coding, categories, and trends leading to an initial set of conclusions. Using typed notes and the Zoom transcripts from three of the four Focus Groups and one set of interviews (because of time constraints), Dr. Feliberty-Ruberte provided a software content analysis of the focus groups and interviews with an interviewee assistance from The Rev. Canon Dr. Hollis.

The resulting learnings from this analysis is further discussed in the following section. The Task Force is able to make available the detailed documentation used in gathering and analyzing the outcomes for further review by directly contacting Dr. Feliberty-Ruberte at

vfelibertyruberte@yahoo.com

Initial Learnings from Focus Groups and Interviews - Emerging Themes

Within the time frame of our work together, we completed four Focus Groups and several interviews. Three Task Force members led each Focus Group on ZOOM, following the prescribed procedure:

Step 1. Task Force members welcomed the participants, everyone made brief introductions to each other in the ZOOM room.

Step 2. Task Force members reviewed ground rules for the Focus Group, emphasizing confidentiality and that answers were being recorded in aggregate. No names or places would be identified.

Step 3. Task Force assured participants Focus Groups would be 90 minutes long at the most.

Step 4. Task Force members debriefed and sent notes/transcripts to Dr. Feliberty-Ruberte.

Upon completion of the data gathering, the qualitative analysis revealed the following overarching themes, or goals (as they are referred to in the qualitative analysis):

1. **Understanding Engagement in Social Justice Ministries:** This goal highlights individuals and communities engaging in social justice ministries driven by personal motivations, lived experiences, and a desire to address historical and continuing wrongs. Challenges within the institutional church, the pursuit of reparations, initiatives in historically black churches, bishop-led racial justice efforts, and diverse community engagement initiatives all contribute to a broader theme of transformation, awakening, and active involvement in social justice work. The focus is on understanding, empathy, and direct action to address systemic issues and serve marginalized communities including prison ministry and advocacy.
2. **Understanding how changes in priorities, enthusiasm, leadership, and other aspects impact social justice ministries sustainability and ongoing work:** This goal revolves around the challenges and dynamics influencing the sustainability of social justice ministries. These include attrition, leadership turnover, burnout, and the impact of institutional memory. The role of community engagement, visionary leadership, and various strategies, such as spiritual formation and equity-focused language, are crucial in addressing these challenges. Additionally, the importance of diocesan initiatives, leadership support, and the role of inspiration and support from the community play significant roles in sustaining ongoing social justice work.

3. **Understanding the role of imagination in maintaining engagement in social, environmental, gender, and racial justice work:** This goal lifts up the innovative strategies employed in maintaining engagement in social, environmental, gender, and racial justice work. These strategies include a connection to the arts and retreats, active participation through the recreation of past resolutions, and an inclusive approach to inviting people from diverse backgrounds. In addition, the focus is on inclusivity in decision-making, including policy and funding decisions, with a particular emphasis on listening to voices that are systematically excluded. The acknowledgment of the role of imagination and reimagining is crucial, along with an awareness of historical context in shaping these efforts.
4. **Understanding ideas or recommendations given to The Episcopal Church about creating a church whose life is based on and centered in Justice:** This goal emphasizes the importance of active engagement, inclusive decision-making, and acknowledging the challenges and obstacles in the pursuit of social, environmental, gender, and racial justice. It calls for listening to the marginalized, recognizing the wisdom in diverse voices, getting involved in real, messy work, and being honest about the community's priorities. The recommendations also highlight the need for spiritual formation, sustained social justice movements, and the role of leadership diversity and the bishop in creating a just church. Specific challenges in local churches, such as real estate development and membership definition, add context to the broader recommendations.

Dr. Feliberty-Ruberte's Interpretive Synthesis and Conclusion is that...

[T]he qualitative research analysis developed encompasses multiple dimensions of social justice ministries within The Episcopal Church, addressing issues of personal identity, institutional challenges, engagement strategies, and recommendations for a justice-centered church. Each goal reveals distinct facets contributing to a holistic understanding of the dynamics at play. This conclusion also points to an additional opportunity to build upon the grass-roots church-wide/nationwide community of individuals involved in prison ministry and recognize Episcopal Prison Ministry Community (EPMC)-

Goal #1: Understanding Engagement in Social Justice Ministries The analysis illuminates the personal motivations and identity of individuals engaged in social justice ministries. It portrays the challenges faced within the institutional church, the intricacies of reparations efforts, initiatives within historically Black churches, and the role of a bishop-led racial justice initiative. The strands of work prioritize various aspects, from scholarships to community engagement initiatives. The main idea centers on understanding, empathy, and direct action to address historical and ongoing injustices.

Goal #2: Understanding Impact on Sustainability and Ongoing Work This goal delves into the challenges affecting the sustainability of social justice ministries, such as attrition, leadership turnover, and burnout. The qualitative data reflects a nuanced understanding of the obstacles faced, emphasizing the importance of conversation, spiritual formation, and addressing internal and external challenges. The main idea revolves around the need for strategic leadership, sustained commitment, and overcoming obstacles to maintain ongoing social justice work.

Goal #3: Understanding the Role of Imagination, The analysis explores the role of imagination in maintaining engagement in justice work. It highlights innovative strategies like connecting to the arts, inclusive decision-making, and policy inclusivity. The main idea underscores the importance of creative approaches, inclusivity, and historical context in sustaining engagement in social, environmental, gender, and racial justice efforts.

Goal #4: Recommendations for a Justice-Centered Church The final goal reveals recommendations for creating a church centered in justice. The codes reflect a call for active listening, acknowledgment of lived experiences, involvement in real work, and an emphasis on spiritual formation. Challenges in the institutional church, including real estate decisions and struggles with reparations, are addressed. Additional focus on issues of prison equity and prison reform while identifying ministries that can support the return from incarceration to society. We are reminded that all aspects of social justice at some point will also impact the family and especially children. The main idea advocates for an inclusive, transformative approach, acknowledging diversity, and a spiritual foundation to build a just church.

Conclusion: The qualitative analysis done provides a comprehensive understanding of social justice ministries within The Episcopal Church. It navigates the complexities of personal identity, institutional challenges, imaginative engagement, and recommendations for justice-centered church practices. The synthesized findings underscore the importance of empathy, diversity, sustained commitment, and creative strategies in addressing social, environmental, gender, and racial injustices. There is also an opportunity to offer parishioners innovative/creative ways to be involved so that everyone, including those with challenges/disabilities can be included. The multifaceted nature of the analysis contributes to a nuanced comprehension of the intricacies involved in fostering justice within a faith-based community.

The Task Force was able to organize and conduct focus groups and interviews within a few months and gleaned extensive information. However, it is obvious to the members that more time would yield greater insights. All of us who conducted Focus Groups were inspired by the leaders we met and convinced more than ever that the Holy Spirit is powerfully calling the Church to Ground ourselves in Justice as Christian Ministry. While there is much joy there are also many challenges and impediments to this “Grounding” or Centering of Justice as Christian Ministry.

To substantiate and support the initial themes and findings, the interviewers heard a number of important stories. Eloquently stated as a summary of the observations and testimony that resonated with the majority of those interviewed is the following recommendation for the task force to consider:

“Listen to the people around you. Lift the voices of the people who are in need. Learn how to be uncomfortable in every situation. If you do not have the lived experience, do not take the lead in trying to address the issues. Be honest about what type of community you are: if liturgy is the most important thing, do not pretend that prayer and hymns are going to address hunger and homelessness. Recognize the wisdom and intelligence of the people who speak more languages than you and who have accents they already know all the words you know, in more than one language! Get your vestments dirty, for that’s the real radiant sign that you have been doing the work. Celebrate the muddy carpet, and the stinky pew, and the missing pieces of holy bread, for that’s the sign that a person without stable housing has been fed.”

Conclusion:

Statement of Need for the Church and Recommended Next Steps

The importance, scope, and change impact of this mandate requires substantive analysis and robust rationale for application throughout The Episcopal Church (TEC). Given the abbreviated timeframe to accomplish this (less than 11 months), the Task Force has focused on building a strong beginning and foundation to move the concept forward. At the outset, to focus on the concept of social justice, the Task Force built the framework for its work, by agreeing to view social justice through an integrative lens encompassing environmental and racial justice. The initial findings point to a need, a willingness, and an activism to include Social Justice as a Christian Ministry. Innovative thinking and open minds can bolster the support of identification of concrete activities, resources, and steps leading to institutional change.

For that reason, the Task Force under the guidance of the Task Force Chair Bishop Marc Andrus and Ms. Sarah Lawton, has crafted a new resolution designed to address the following:

- Establish a new task force focused on prioritizing and subsequently completing the planks of the initial mandate that the current task force was not able to complete.
- Designate the new task force with a mandate for specific and achievable recommendations for institutional change within our faith tradition supporting social justice as a christian ministry including but not limited to:

- areas of governance and structure
 - prayer and liturgy
 - catechesis and lifelong discipleship formation for all especially for the laity
 - ensure consistency with an equitable and inclusive polity
- As described above, several insights were identified through the focus groups and meetings that were conducted. We offer these preliminary learnings as a basis for the proposed new task force to begin with a focused work plan:
 - There is much good justice work happening already across our church! For which we give thanks.
 - Our local leaders, in congregations, chaplaincies, and other ministries, want to be equipped and trained to do justice work.
 - People in our local ministries want to be better networked across provinces and the whole church to improve collaboration along with shared access to resources, and to overcome siloing across different issues (such as creation care, racial justice, economic justice, LGBTQ+ justice) – understanding that siloing is itself a tool of white supremacy culture.
 - A how-to-guide to equip our local leaders and improve networking and collaboration should be an outcome of the new task force.

Proposed Resolutions

A096 Task Force on Equipping a Church Grounded in Justice as Christian Ministry

Resolved, That the 81st General Convention direct the appointment of a new task force be created for a term of six years or two triennia, to carry on and deepen the work begun by the Task Force on Imagining a Church Grounded in Social Justice as Ministry (Mandate A078- of the 80th general Convention) with a diverse group to include 2 bishops, 2 priests, 2 deacons, and 10 laypersons, and recommend the appointment of some members from the previous A078 Task Force in order to maintain some continuity. The new Task Force can begin immediately to address the work enumerated below and report to the 83rd General Convention; and be it further

Resolved, That the work of the newly created task force include the following in order to

- a) consider what the church must look like if we put our vocation to love our neighbor and to be repairers of the breach at the center of our work;
- b) continue the work of the previous task force in reaching out to local, diocesan, and churchwide groups that are doing social justice and racial reconciliation work focused on systemic change, in order to understand what resources and gifts we already have in this work and where the gaps are;
- c) work with churchwide staff to support the creation of a digital hub to connect to and provide a one-stop place for church members to reach existing justice resources;
- d) develop an experiential model for listening to and documenting the experiences of justice workers at our local levels; and
- e) liaise with relevant interim bodies on consideration of these questions and how to address the institutional barriers to change in the church;
- f) be charged with making recommendations to the 83rd General Convention for specific ways that the Church can equip and train local leaders to do justice work and coordinate networks of justice work across our provinces and churchwide;

And be it further

Resolved, That the General Convention requests the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation (excluding meeting expense already in GCO budget) of \$40,000 to primarily address the development of a digital hub including accessibility, training, and maintenance for the implementation of this resolution.

EXPLANATION

At the outset, to focus on the concept of social justice, the Task Force built the framework for its work, by agreeing to view social justice through an integrative lens encompassing environmental and racial

justice. As a result, the efforts of this Task Force led to the following Statement of Need for the Church and Recommended Next Steps.

The importance, scope, and change impact of this mandate requires substantive analysis and robust rationale for application throughout The Episcopal Church (TEC). Given the abbreviated timeframe to accomplish this (less than 11 months), the Task Force has focused on building a strong beginning and foundation to move the concept forward. The initial findings point to a need, a willingness, and an activism to include Social Justice as a Christian Ministry. Innovative thinking and open minds can bolster the support of identification of concrete activities, resources, and steps leading to institutional change.

For that reason, the Task Force under the guidance of the Task Force Chair Bishop Marc Andrus and Ms. Sarah Lawton, crafted this new resolution designed to address the following:

- Establish a new task force focused on prioritizing and subsequently completing the planks of the initial mandate that the current task force was not able to complete.
- Designate the new task force with a mandate for specific and achievable recommendations for institutional change within our faith tradition supporting social justice as a christian ministry including but not limited to: (a) areas of governance and structure, (b) prayer and liturgy, (c) catechesis and lifelong discipleship formation for all especially for the laity, (d) ensure consistency with an equitable and inclusive polity

As described above, several insights were identified through the focus groups and meetings that were conducted. Preliminary learnings as a basis for the proposed new task force recommends that the task force begin with a focused work plan and include the following:

- There is much good justice work happening already across our church! For which we give thanks.
- Our local leaders, in congregations, chaplaincies, and other ministries, want to be equipped and trained to do justice work.
- People in our local ministries want to be better networked across provinces and the whole church to improve collaboration along with shared access to resources, and to overcome siloing across different issues (such as creation care, racial justice, economic justice, LGBTQ+ justice) – understanding that siloing is itself a tool of white supremacy culture.
- A how-to-guide to equip our local leaders and improve networking and collaboration should be an outcome of the new task force.

A097 Developing a Common Framework for Anti-Racism Training

Resolved, That the 81st General Convention, recognize that widely different criteria have been used across the Church to determine if the completion of anti-racism training defined by Canon Article III.6.5.g Training and General Convention Resolution has been satisfied; and that this work has been inspired by the collaborative efforts with the Executive Committee on Anti-Racism (ECCAR); and be it further

Resolved, That The Episcopal Church (TEC) recognize that in order to maintain a common theological framework and pastorally congruent response regarding our commitment to dismantle the sin of racism, specific components must be included in any Anti-racism or Racial Reconciliation training designed to fulfill the canonical requirement for all persons seeking ordination and all persons specified in General Convention Resolution 2000-B049; and be it further

Resolved, That the specific components that must be included in any Anti-racism or Racial Reconciliation training to be interactive, offer opportunity for reflection and include as follows:

- 1) A Historical Component - to include Canonical Requirements, Domestic and Foreign Missionary Society's Historical Commitment found in General Convention resolutions, "The Church's Contemporary Response to Racism", and "Becoming Beloved Community",
- 2) An Information OR Didactic Component - to include learning about the Baptismal Covenant, the Hebrew & New Testament Prophetic traditions, and the History of White Supremacy. Systemic Power, Classism, Sexism and other Intersectional Oppressions, The Doctrine of Discovery, Racism, Internalized Racial Superiority & Microaggressions and Internalized Racial Oppression must be interrogated and challenged. A guide for analyzing and dismantling unintentional institutional racism is an important component if we are to fulfill the intentions of the racial reconciliation resolutions. The hope will be that participants become co-conspirators and agents of Racial Reconciliation and healing in the Episcopal Church and beyond.
- 3) Activities will include Prayer, Respectful Communication Guidelines, Power Analysis and other activities as indicated to accomplish learning objectives for historical and informational components.
- 4) The training will reflect common learning objectives and appropriate adult pedagogy including a process/method for reinforcing the training so that it is not a standalone "one and done" course such as the creation and nurturing of an antiracist identity for individuals and institutions;

And be it further

Resolved, That Executive Council's Committee on Anti-Racism (ECCAR) create an Anti-racism Certification Framework include a master tracking database/mechanism to ensure consistency even as clergy and lay leaders transition across dioceses and TEC-level ministries and to more completely define the above components; and be it further

Resolved, That TEC staff be directed to work with the Executive Committee on Anti-Racism (ECCAR) to implement a certification process that would allow for on-line testing of clergy, laity,

and trainers to ensure the consistent fulfillment of the spirit of the requirement for anti-racism training across the Church according to the Anti-racism Certification Framework defined by the Executive Council Committee on Anti-Racism; and be it further

Resolved, That TEC staff provide an annual report to ECCAR on the status of use and effectiveness of the certification process; and be it further

Resolved, That the General Convention requests the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation (excluding meeting expense) of \$55,000 for the curriculum planning, scope of the effort, and development of the RFP for the tracking module of this resolution.

EXPLANATION

Currently Canon Article III.6.5.g Training requires the Church's Anti-racism training for ordination. Additionally, the General Convention of The Episcopal Church has passed resolutions concerning anti-Racism and Racial Reconciliation at every General Convention since at least 1988. They include 1988-A112, 1991-D113, 2009-A142, 2012-A127, 2015-D040, and have called upon the church to participate through anti-racism training and other activities to dismantle and eradicate structures of racism and integrate the practices of anti-racism into our life as a church. Specifically, Resolution 2000-B049, which was reaffirmed by 2018-A045, mandates that *“lay and ordained leadership of the Episcopal Church, including all ordained persons, professional staff, and those elected or appointed to positions of leadership... be required to take anti-racism training and receive certification of such training... And that each diocese determines those lay and clergy leaders who are to take the training.”*

Stories and information obtained through the focus groups and interviews led the Task Force members to include the focus on racial justice and discussions regarding anti-racism training. Creating this resolution was identified by recognizing the need for a consistent method to ensure that church-wide leadership and laity experienced the various issues as well as building knowledge about the sin of racism, the reasons behind reparations, and the vision of the beloved community. Reviewing the previous resolutions and actions taken or not taken, informed this resolution.

The Task Force also determined that the concerns and issues of language are important. As a result, the Task Force added the word 'systemic' to the word power to particularize the type of power being addressed. Additionally, when analyzing and dismantling unintentional institutional racism this concept is an important part of shifting the focus from merely addressing the motives of individuals to the built-in advantages for whites that are part of the structure of our institutions. Institutional practice, policy, culture, etc., is the source of the racial social disparities.

The need for the creation and nurturing of an antiracist identity for individuals and institutions will be necessary if we accept that both white people and people of color are coopted by racism in the form of Internalized Racial Superiority and Internalized Racial Oppression as part of our identity, then the resistance to that is to explore an identity that is counter to this.

Additionally, consistent monitoring of training completion and effectiveness is needed as more members transition to different geographic locations, led the team to include the need to have a

church-wide learning management system or some electronic version and not maintaining excel spreadsheets or other manual/paper-based methods.

“Our Baptismal Covenant calls us to speak in concrete terms about today’s sins of racial injustice and inequality. We should all be advocates for the eradication of racism in all aspects of life, especially our religious life. The effects of racism escape no institution, not even the Church. We know that institutional racism can be conscious or unconscious. While the motivation of the institution and its members is important, it is the disparate racial outcomes of policy and/or practice that reflect an institution’s racism. The elimination of racism in the Church cannot be equated with assimilation, but rather with unity-in-diversity. No one group may demand the unilateral surrender of another’s culturally determined values as the price for full participation in the church community. In celebrating diversity, we manifest our oneness in Christ”.⁽¹⁾

(1) *Language attributed to The Episcopal Diocese of Arizona: An Anti-Racism Theological Statement.*

A098 Fossil Fuel Non-Proliferation

Resolved, That the 81st General Convention authorize Provinces, Dioceses, Congregations, and all other institutions of The Episcopal Church to recognize the efforts of the COP 28 [Conference of the Parties (COP)] regarding fossil fuel non-proliferation and to begin the process of planning in support of this work as reiterated by The Executive Council of the Episcopal Church in October 2023; and be it further

Resolved, That this General Convention reiterate its engagement in the work of The Episcopal Church, and international organizations to which it is connected, to turn back the effects of climate change and environmental degradation, recognizing the urgent, concentrated action in this present moment that is needed to prevent the suffering of life on this planet, in the near term and the future; and be it further

Resolved, That this General Convention acknowledge the work of the nations of Vanuatu and Tuvalu, along with other Pacific Island nations, to forge the Fossil Fuel Non-Proliferation Treaty, which has been endorsed by the World Health Organization and the European Parliament, along with thousands of civil society organizations and individuals committed to the mitigation of climate change and the factors that contribute to it; and be it further

Resolved, That this General Convention recognize that the Treaty is calling the people of the world not just to make technical adjustments to negative impacts on the planet, but to transform lives by phasing out fossil fuel production and the reliance on fossil fuels by the parties to the Paris Accords; and be it further

Resolved, That this General Convention endorse the Fossil Fuel Non-Proliferation Treaty as it is set before the United Nations Climate Summit, held in Dubai in December, 2023; and be it further

Resolved, That Provinces, Dioceses, Congregations, and all other institutions of The Episcopal Church be strongly encouraged to create a plan for phasing out fossil fuels over the next 10 years, post the plan on its websites, present an annual update report at the annual meeting of the diocese and/or ministry, and provide plan and annual updates to the Office of Creation Care; and be it further

Resolved, That the General Convention requests the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation (excluding meeting expense already in GCO budget) of \$40,000 to primarily address the development of website updates, forms development, and identify staff support the implementation of this resolution.

EXPLANATION

The Episcopal Church has consistently, through past General Convention resolutions, stayed abreast, even taken leadership positions, with respect to advocacy in climate change and environment. The Episcopal Church, in keeping with our following a living Christ, rather than calling to mind a Jesus who visited us once in the past, is a learning, evolving body. Thus, as the latest climate change science and the results of the 2023 Global Stock take have demonstrated, it is no longer sufficient to reduce greenhouse gas emissions, we must phase out the use of fossil fuels.

The call to phase out fossil fuels originated in 2023 with seven Pacific island nations, nations who are already experiencing the leading edge of climate change. The call took the form of the Fossil Fuel Non-Proliferation Treaty. The Executive Council of the Episcopal Church passed a resolution in November of 2023 that endorsed the aims of the treaty, allowing the Presiding Bishop's delegation to COP 28 [Conference of the Parties (COP)] to use the treaty in its policy platform.

By way of background, the meeting purpose of COP is authorized through the framework of the United Nations Framework Convention on Climate Change (UNFCCC). The United Nations Climate Change Conferences serve as the formal meeting of the UNFCCC parties – the Conference of the Parties (COP) – to assess progress in dealing with climate change, and beginning in the mid-1990s, to negotiate the Kyoto Protocol to establish legally binding obligations for developed countries to reduce their greenhouse gas emissions. These annual meetings serve to further negotiations and obligations of the various treaties and protocols which create a general path towards climate action. Any final text of a COP must be agreed by consensus. ⁽¹⁾

The embrace of the Fossil Fuel Non-Proliferation Treaty and its core goal - the phase out of fossil fuels - by the 81st General Convention will provide an even stronger basis for our Church's advocacy around this essential goal.

(1) Retrieved from https://en.wikipedia.org/wiki/United_Nations_Climate_Change_conference

A099 Task Force for Indigenous Justice To Increase Advocacy Groups Reflecting Creation Care and Environmental Justice Ministries

Resolved, That the 81st General Convention authorize a task force for Indigenous Justice to be formed for the following triennium. Membership in the Task Force will represent the indigenous demographic with 2 Bishops, equal number of presbyters, deacons, and laity not to exceed 16 members; and be it further

Resolved, That an initial focus of the Indigenous Justice task force be on eco-justice; and be it further

Resolved, That in the next triennium the Indigenous Justice task force will work to promote the recognition of sovereignty for Indigenous People in the negotiations of the United Nations climate summits (the Conference of Parties to the United Nations Framework Convention on Climate Change, the COPs); and be it further

Resolved, That the General Convention requests the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation (excluding meeting expense already in GCO budget) of \$30,000 to primarily identify and support the media and cultural education necessary to be effective.

EXPLANATION

There has been and continues to be a consistent call for allies to the eco-justice initiatives of Indigenous Peoples to promote the recognition of Indigenous sovereignty as demonstrated from members of the Standing Rock Lakota People protesting the Dakota Access Pipeline in 2016/2017 to Indigenous voices at COP 28 in Dubai, 2023. The Task Force will work in collaboration with TEC's Department of Ethnic Ministries and the Office of Indigenous Ministries to champion the identified priorities.

It is consistent with the eco-justice stance of the Episcopal Church to follow the lead of Indigenous Peoples who define for themselves their justice priorities, and to act in concert with these self-defined goals.

TASK FORCE ON INDIGENOUS LITURGY

Members

The Rev. Canon Cornelia Eaton, Chair	Navajoland Area Mission, VIII	2024
Mr. Richard Ackley	Fond du Lac, V	2024
Mr. Thomas Alexander	Arkansas, VII	2024
The Rev. Dawn Allen-Herron	Alaska, VIII	2024
Ms. Rachelle Brown-Slover	Navajoland Area Mission, VIII	2024
Mr. Joshua Floberg	North Dakota, VI	2024
The Rt. Rev. Jonathan Folts	South Dakota, VI	2024
The Rt. Rev. Carol Gallagher	Massachusetts, I	2024
The Rev. Betty Glover	Alaska, VIII	2024
Ms. GJ Gordy	Navajoland Area Mission, VIII	2024
Mr. Warren Hawk	South Dakota, VI	2024
Ms. Ashley Hubbard	Navajoland Area Mission, VIII	2024
The Rt. Rev. Mark Lattime	Alaska, VIII	2024

Representation at General Convention

Deputy GJ Gordy, Deputy Warren Hawk, Deputy Thomas Alexander, Deputy Richard Ackley, Deputy Minnie Steele, Deputy Canon Cornelia Eaton, Rt. Rev. Mark Lattime, Rt. Rev. Carol Gallagher, Rt. Rev. Jonathan Folts

Acknowledgements

We acknowledge the work of our elders, such as Dr. Owanah Anderson, Rev. Dr. Carol Hampton, the Rt. Rev. Steven Charleston, Rev. Ginny Doctor, and many others who in their time of service to the Church worked tirelessly to collect and share these resources. Since then, few resources have been gathered and most have not been digitized.

Mandate

2022- A141 Develop Indigenous and Native Liturgical Resources

Resolved, That, on the homelands of the Piscataway, Nentego (Nanticoke), and Susquehannock peoples, the 80th General Convention of The Episcopal Church creates an intentional effort to value and embrace Native and Indigenous liturgy and spirituality. This General Convention calls for a Task Force on Indigenous Liturgy to document and develop culturally appropriate liturgical materials that reflect the Native and Indigenous spirituality that can then be used in Native and Indigenous faith communities; and be it further

Resolved, That these liturgical resources would honor and uphold the original stewards of our land and the deep connection with Great Spirit and Earth, written in and/or referencing the traditional languages, incorporating the cultural customs, stories, and beliefs, and that address the current needs of the Native and Indigenous faith communities; and be it further>

Resolved, That this Task Force would up to 20 persons, majority Native and Indigenous identified, be appointed jointly by the President of the House of Deputies and the Presiding Bishop. Members would reflect a geographically diverse representation from the Church and tribal affiliations. This membership would include Native spirituality theologians, liturgy developers, and practitioners. Laity would make up half of the entire membership. 1 member would overlap with the Standing Commission on Liturgy and Music to be a liaison; and be it further>

Resolved, That these liturgical resources would be curated and developed with the consultation of the Native American Ministries Council of Advice and presented for review during the Winter Talk 2023 and 2024 gatherings; and be it further

Resolved, That the plans for this collection be presented to the 81st General Convention as a model for culturally-informed worship and contextual theology; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance consider a budget allocation of \$200,000 for the implementation of this resolution and Task Force.

Summary of Work

The Task Force met in person in Cleveland, Ohio in March of 2023, and had multiple zoom meetings to organize and begin the research and collecting liturgical resources.

We have begun the process of the collecting Indigenous, Native American, Alaska Native and Native Hawaiian, liturgical resources. Because of the short period of time of biennium and that Indigenous communities are diverse in languages, traditions and spiritual expressions are dispersed across the whole Church, our work is not complete and needs to continue.

Proposed Resolutions

A095 Continue the Task Force on Indigenous Liturgy

Resolved, That the work of the Task Force on Indigenous Liturgy continue through the next triennium 2025-2027 and be funded for 300,000 to continue the work.

EXPLANATION

That the Church participated in the loss of Indigenous languages, cultures and traditions so this is important work of restorative justice on behalf of the whole Church

TASK FORCE ON INDIVIDUALS WITH MENTAL ILLNESS

Members

The Rev. Dr. David Gortner, Chair	Spokane, VIII	2024
Dr. Brandon Beck	West Texas, VII	2024
Ms. Megan Carlson	North Carolina, IV	2024
Mr. Luis Collazo Lugo	Puerto Rico, II	2024
Mr. Billy Cottrell-Jackson	Southwest Florida, IV	2024
Dr. Adrienne Duvall	Dallas, VII	2024
The Rev. Jedediah Fox	Olympia, VIII	2024
Mr. Jeffrey Kincaid	Milwaukee, V	2024
The Rev. Myra Kingsley	Arizona, VIII	2024
The Rt. Rev. Kevin Nichols	Bethlehem, III	2024
Mrs. Tammy Pallot	Atlanta, IV	2024
The Rev. Deacon Susan Phillips	Delaware, III	2024
The Rev. Matthew Simpson	Maine, I	2024
The Rev. John Stewart	Alabama, IV	2024
Ms. Liz Wendt	Pennsylvania, III	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024

Changes in Membership

Jeffrey Kincaid withdrew from membership in the first year. Billy Cottrell-Jackson withdrew in May of 2023 due to family health concerns.

Representation at General Convention

Deputies Megan Carlson (NC), Liz Wendt (Penn), David Gortner (Spokane), Tammy Pallot (Atlanta), the Rt. Rev. Kevin Nichols (Bethlehem) are authorized to receive non-substantive amendments to this Report at the General Convention.

Acknowledgments

Thank you to our new class of Instructors for Mental Health First Aid for Adults. You will be a valuable resource for the church in the next Triennium.

Thank you to everyone that volunteered as a potential instructor. We have saved your names and look forward to getting you trained in the near future.

Mandate

2022 - A110 Continuation and Expansion of Task Force on Ministry to Individuals with Mental Illness

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

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

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

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

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

2022-A107 - Ministry with People with Mental Illness and Their Families

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

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

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

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

2022-A108 - Training of trainers for Episcopal Provinces in Mental Health First Aid

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

Resolved, That the 80th General Convention authorize and fund the training of at least 15 regional trainers in Mental Health First Aid (MHFA) for the sake of providing basic MHFA training in the Provinces of the Episcopal Church, drawing as well upon the expertise of MHFA trainers who are part of the Union of Black Episcopalians along with other Episcopal MHFA trainers, with training to be completed by May 2024, so that they will become available as resource trainers for the dioceses in each Province; and be it further

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

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

2022-A109 - Developing Curriculum and Required Training for Clergy in Mental Health Pastoral Care

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

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

Resolved, That the 80th General Convention recommend the training of all active priests, deacons, and bishops in this curriculum for mental health and mental illness awareness; and be it further

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

Summary of Work

Executive Summary of the Task Force Work

Mental health and wellness affects every province, diocese, ministry setting, and person. Individuals with mental illness are among the most marginalized in the world as it is made up of people from all walks of life and all communities. Mental illness can affect anyone regardless of social standing, geography, race, or gender identity. Our work in this abbreviated triennium highlighted the need to prioritize ministry related to mental health.

The continuing Task Force on Individuals with Mental Illness took resolution 2022-A110 as its overarching directive: to develop and provide resources, trainings, and curricula on mental health to be shared with the Episcopal Church, in order to increase awareness, improve pastoral care, and strengthen basic capacities that foster welcome, inclusion, support, and advocacy. This primary mandate became the basis for work outlined in the other secondary resolutions.

Resolution 2022-A107 called for the Episcopal Church to take up the mantle of responsible care, support, and advocacy for mental health. The call to the church was to equip lay and ordained people with skills and tools for compassionate, competent interaction with people experiencing mental illness and mental health challenges. This resolution echoed prior resolutions from the past decades but with greater emphasis on taking action.

Resolution 2022-A108 spelled out a clear direction for training and equipping people in the church with skills for caring interaction with people experiencing a wide range of mental health challenges, including people experiencing crisis. The resolution pointed specifically toward recruiting, training, and deploying a small set of Episcopalians, spanning the Provinces of the Episcopal Church, as instructors in Mental Health First Aid (MHFA).

Resolution 2022-A109, the resolution calling for the development of a deeper curriculum for clergy, was proposed by the prior Task Force and taken up as work by this Task Force. The Task Force produced a curriculum for all active clergy and postulants, with a first foundation of training in Mental Health First Aid.

The Task Force's work yielded six resources for building awareness and basic skills in spiritually grounded care and support for people with mental health challenges, recruited, trained and deployed eleven MHFA instructors from eight of the nine Provinces of the Episcopal Church, and drafted a robust curriculum for increased knowledge and skill for clergy and lay leaders. From this work and the rapidly rising incidence of mental illness across the globe in recent years, it became clear that the

Episcopal Church must emphasize continuing growth in basic competency in Mental Health First Aid. The newly trained MHFA instructors, joining with other Episcopalians already certified as MHFA instructors, have begun to provide one-day MHFA courses for congregations, schools, camps, diocesan gatherings, clergy gatherings, and church networks to equip people with these foundational skills for recognizing potential mental health crises and challenges and for interacting in helpful ways. Hundreds of people will have received this basic training by the 81st General Convention in the summer of 2024.

Continuing forward with the goals set in Resolution 2022-A109, The Task Force urges the Episcopal Church to move toward requiring Mental Health First Aid as training on par with Safe Church and Racial Reconciliation training. The Task Force has proposed a resolution urging MHFA training for all active clergy, postulants, candidates, and lay members in senior leadership positions. Given the enduring importance of ministry with people with mental health challenges and given the sporadic and disparate attention to matters of mental health as well as physical health in varied Task Forces over decades, this Task Force has urged the creation of an enduring Standing Commission for Human Health and Wellness, supported consistently with funding for continued development and deployment of resources and training that support the church's ministry related to mental and physical health.

The Task Force completed the vast majority of the aims and initiatives set out in Resolutions A107-A110. It is also clear that further work is needed to ensure continuing development of the church's capacity in welcoming, including, supporting, encouraging, empowering, and advocating with people who face mental health challenges. The Task Force has completed its set tasks as a significant first step in what must be ongoing work of the church.

The future of the work that has been completed here depends upon the church's continuing efforts to grow in its ministry in relation to mental health. Resolutions brought forward by the Task Force for the 2024 General Convention aim toward such churchwide affirmation of continuing growth across all orders of ministry, specifically in mental health ministry, and more broadly in integrated holistic ministry of health and human wellness.

Detailed Summary of the Task Force Work

General Overview of the Task Force Goals and Work Plan

The Task Force on Individuals with Mental Illness began our work online in mid-January with a data dump of all the material and resources that the Task Force accomplished during the 2018 – 2022 triennium cycle. New members of the Task Force were invited to review this material in advance of our first meeting in February 2023.

At the first meeting, this triennium's Task Force reviewed the history of the past triennium's Task Force, expressed individual's goals for involvement, and started to establish a work plan for this shortened triennium. Based on the prior work of the Task Force and the resolutions that were passed at the 80th general convention, the group knew there were three primary task to accomplish:

- Resource development and deployment
- Training development and deployment
- Curricula development and deployment

This division of tasks would be instrumental in achieving the underlying mission and vision of our membership, specifically:

- to increase awareness of mental illness, its prevalence, and the need for effective ministry;
- to equip all clergy and laity in dioceses, congregations, schools, seminaries, and other entities of the Episcopal Church to interact in compassionate, competent, and supportive ways with people with mental health challenges;
- to strengthen care, inclusion, bridge-building support, and advocacy/stigma-reduction for people with mental illness in Church settings and beyond, for clergy and the whole Church; and
- to advocate for clergy to be intentional about their own mental health and self-care.

Early in our time together, the group were fortunate to be able to meet as part of the Interim Bodies meeting in Cleveland at the end of March to begin the bulk of our work in each of these three priority tasks. The team were rocked during this time by a crisis regarding budgetary support of our mandate. Following a very quick panic, the team pivoted first to identifying external means of funding and then back to condensing our work plan once funding was secured from the General Convention Office. During the intense 60 hours, the team broke into sub-groups for each of the planned tasks. The Training group was tasked with bringing a planned training of Instructors in Mental Health First Aid – Adult (MHFA-A) under the constraints of our new budget. The Resource group laid out a plan for resource production for faith communities outlining best practices on key topics. Lastly, given the availability of members, the Curriculum group setup an outline that could be examined and discussed by all members of the Task Force during our time together.

By the end of our time in Cleveland, the group had a clear plan for the next 8 months. The Task Force setup a general cadence of meetings monthly online via Zoom. Each sub-group would work independently on their task between meetings. The meetings became a time to share the progress each sub-group was making to get feedback from the other group. This allowed each group to work at the appropriate pace for their task, which was helpful for our training group which was coordinating

schedules with many diverse individuals and groups to pick an advantageous time to train our Episcopal Church Instructors.

That time was determined to be in conjunction with a second Interim Bodies meeting at the end of October (a few weeks after the majority of the Interim bodies). For the first part of the week, eleven volunteers from 8 of the 9 Provinces were trained as instructors for Mental Health First Aid (MHFA). The second half of the week was spent working intensely to put the finishing touches on the resource documents and curriculum. These finalized documents are included in the supplemental section of this report. The last task of the group was to put into motion through the writing of resolutions to continue the work of the Task Force for the next triennium and beyond.

The Task Force proposes the creation of a Standing Commission to provide stability and sustainability for the Episcopal Church to minister to individuals with mental illness and to grow the mandate to encompass all facets of health and wellness, including physical, mental, emotional, relational, and spiritual facets of life. The Task Force is proposing some additional resolutions for the next triennium based on the needs about which the group heard during the work of this triennium.

Challenges and Lessons Learned:

The Task Force had a few challenges along our way to accomplishing our work. But with God's help, the team overcame. The shortened triennium focused our work on our goals when many other possible avenues and activities might have otherwise pulled our attention. The work for and with individuals with mental illness and the caregivers that support them have a diversity of needs before considering the diversity of the population affected. The group focused on laying a cornerstone during this triennium that could support the work of future bodies.

As previously alluded to, the Task Force also encountered issues with funding early in our work. Although a few of the resolutions the group took as our mandate included budget request, the money was not guaranteed. The group reviewed the possibility of external funding, specifically looking at grants from the US federal government and other church grant foundations. As a task force of general convention, grant funding is exceedingly difficult to process given our ephemeral life. This knowledge of funding would facilitate our resolution writing for the 81st general convention. The Task Force has ensured that any funding needs were clearly asked of the Budget committee to make a best effort to secure funding moving forward. The group have also begun conversations with various departments in the Episcopal Church to understand their capacity to receive outside funding to extend the Mental Health work further.

Another challenge came in the form of external limitations due to a limited budget. MHFA has three primary offerings: Adult, Youth, and Teen-2-Teen. Early in our work, the team hoped that a joint training course to cover both Adult and Youth Aid could happen, but the Certifying organization was not prepared to offer the dual certification on our timeline. [The Task Force continues to be in conversation with the certifying organization to help advocate for dual certification training.] The group voted to pursue MHFA instructor training for the Adult module. Given the current demographics of the church and a general understanding that except for a few specific instances, the Adult module seemed most applicable as a starting point. The team has written resolutions with funding request to ensure that in the next triennium, the church can train instructors in all three courses. While this is good for the future, it meant that many of our identified instructor candidates chose not to be trained as an Adult Instructor. [The Task Force will have their names to pass along to the next body to take up this work.] Finally, as it regards training, the group utilized an in-person private instructor course to save money on a bulk training session. This added a complication to our candidates' decision to complete the course. The training time, demand for being gone for a few days, and schedule changes for training dates again led to a drop-off in eligible candidates. Eleven new instructors were trained and are eager to start work in offering MHFA training in their provinces, many beginning to offer trainings in early 2024. And all those candidates originally identified are ready to be trained as instructors in Adult or Youth modules as soon as General Convention is over, and funding is made available to support instructor training.

Another external limitation is the reach of Mental Health First Aid in Province 9. MHFA is international in its reach but has clear standards about abiding by laws and ordinances governing its approval in each independent nation. This resulted in limits set on who could function as trained instructors in their own countries. The committee hopes that these barriers can be addressed effectively in the next few years. There were also the internal limits within the committee in terms of its member composition. There was a strong range of direct personal and professional experience with mental health challenges, but there was limited variation in cultural and racial contexts represented among committee members. The group strove to hold in mind siblings in Christ with different lived experiences and to honor their traditions and needs regarding mental health. It is the genuine prayer of this group that as this work grows, its leadership will include the full body of Christ. Our work was consistently informed by the earlier (and continuing) work by the Union of Black Episcopalians and the articles and resources they have produced. The group anticipates translation and cultural adaptation of the documents produced, but also recognizes that this is not enough. The group asks for the continuance and growth of this work with greater attention to diversity in composition of the proposed Standing Commission.

Finally, although the group gives thanks to Zoom and Microsoft Teams for enabling work across vast distances, they did still pose a challenge. Teams can be simple to use once you know how to use the platform, but a learning curve exists. For individuals with iOS or Linux operating systems, the

technology became a barrier to inclusion. Zoom is great for facilitating conversation, but not so great for document production. The majority of the work on Curriculum and Resource documents was completed during our two interim body meetings over 150 hours together. The team would work from 8:30 in the morning until 10:00 at night to put our hearts into the work product. Our recommendation for the future is to front load interim body meetings, as Zoom and Teams work better over long distances after community building has happened and when the intention is editing, revision, and discussion of documents and topics.

Sub-Committee on Creating a Mental Health Curriculum

The Curriculum Group for clergy curriculum development and deployment built and expanded upon the work done in resource and training development. A109 called for the creation and launch of a new curriculum to train all Episcopal ordained clergy, candidates, and postulants in awareness that emphasizes pastoral care, the forming of caring relationships, and effective advocacy – including training in basic MHFA and NAMI advocacy.

Unbeknownst to this Task Force, A109 was assigned to the Standing Commission on Formation. Thus, the Task Force’s Curriculum Group worked intently on developing a robust outline for clergy training in mental health ministry. The outline included nine key areas for clergy training in addition to Mental Health First aid training certification:

1. Mental Health First Aid (MHFA) training certification
2. Helpful and Unhelpful Theological / Biblical Frames and Spiritual Practices
3. Individual Pastoral and Spiritual Care, and Discernment of Concerns
4. Family Pastoral and Spiritual Care, and Discernment of Concerns
5. Community Inclusion for Individuals with Mental Illness and Their Families
6. Care for Community in Balance with Individuals’ Mental Health/Illness
7. Self-Recognition, Self-Review, Self-Restoration, Self-Resilience, Self-Strength
8. Response to trauma in the wider community
9. Establishing Resource Connections in One’s Community
10. Alliance and Advocacy

This curriculum outline, including scope and sequence, was designed with the potential of being launched as a hybrid course combining online and in-person sessions.

After developing the outline into a full draft of topics, themes, and core content for each area, the Curriculum team sought high-quality resources and publications to provide rich content for the ten key

areas above. These resources support curricular goals of facilitating more profound training in awareness and knowledge about mental illness, pastoral care, caring relationships, supportive bridge-building, empowerment, and effective advocacy for those with mental illness and their families, along with congregational care and clergy self-care – with foundational theological and spiritual underpinnings.

During this same time period, the Standing Commission had assigned A109 to its own subcommittee, but not much progress was made. In early Autumn of 2023, representatives from A109 Curriculum Group from the Task Force and the Standing Commission’s subcommittee met online to discuss progress and potential of collaboration. Standing Commission representatives were grateful for the work done so far by the Task Force and more than happy to partner with the Task Force in further developing the curriculum. The primary contact with the Standing Commission, from Province IX, indicated interest in facilitating translation and cultural adaptation of the curriculum.

The Curriculum Group met its goal of creating a curriculum plan (attached to this report). Implementation of this curriculum depends upon the next critical steps of creating an instructional module for each key area of the curriculum, translating and culturally adapting materials for Spanish-speaking communities, and deploying MHFA instructors to train clergy in MHFA as a first step.

Sub-Committee on Mental Health First Aid Training

The Training Group embarked on a comprehensive mission to muster, train, and deploy Mental Health First Aid (MHFA) instructors throughout the Episcopal Church. The first step in the process was to compile a list of existing certified MHFA instructors within the Episcopal Church. The group began by emailing diocesan offices, requesting the names of individuals holding MHFA instructor certification. Additionally, the group took advantage of the online community by posting in multiple Episcopal Facebook groups, seeking the names of certified MHFA instructors. These efforts garnered several names; however, the list is likely not comprehensive or inclusive of all certified instructors within the church.

The next phase of the group's work was soliciting individuals to train as MHFA instructors. The group actively sought referrals from diocesan offices to identify potential candidates, leveraging their connections within the Episcopal Church. Moreover, the group reached out to the broader Episcopal community by posting inquiries on various Facebook pages to gauge interest from individuals wishing to become MHFA instructors. The group's efforts also extended to collaborating with Episcopal Camps and Conference Centers, who proved instrumental in recruiting potential instructors by featuring information about MHFA instructor training in their newsletters. Furthermore, the Association for Episcopal Deacons played a significant role in the process by disseminating the request for trainer candidates across their diverse networks. Through these collective efforts, the group received an

impressive response, amassing a list of 60 individuals who were potentially suitable candidates for MHFA instructor training.

After much discussion, the Task Force developed the following expectations for those receiving MHFA Instructor training.

- Attend every day of MHFA training and complete all assignments.
 - Attend in-person training for three days.
 - Complete all pre-work, evaluations, and post-course registration as an instructor.
- Fulfill all MHFA requirements for Instructor Certification:
 - Teach three one-day courses each year.
 - If dually certified (adults and youth), at least one course per year must be in each certification.
 - Fully utilize the process outlined by MHFA for enrolling participants, collecting fees, obtaining and distributing materials, and offering instruction.
 - Materials must be ordered from MHFA and paid for within 30 days of each training. Fees are directly reimbursable to the instructor directly from participants or through intermediary assistance from the diocese/network.
- Fulfill the following minimum expectations for the Episcopal Church
 - Commit to providing MHFA courses for at least five years.
 - Provide at least 3 MHFA courses per year specifically for the Episcopal Church with a minimum of 10 participants at each course.
 - Offer at least one class per year outside one's home diocese.
 - Courses for the Episcopal Church will be free for at least the first two years (or the first six courses, whichever comes first). After the initial two years (or six courses), the maximum compensation for courses provided to the Episcopal Church shall be no more than \$300 per course.
 - It is always appropriate to request travel expenses, including room and board. Keeping compensation to a minimum radically reduces individual registration fees.
 - When providing additional courses for communities outside the Episcopal Church, charging the recommended MHFA instructor fee is permitted.
 - The goal of the courses offered for the Episcopal Church is to provide education for as many Episcopal clergy and laity as possible. If the class has not reached capacity, ecumenical partners and individuals from the wider community are welcome to attend.
 - Always notify the diocesan, provincial, or network office of training being offered. Promote and recruit, in partnership with diocesan staff, congregations, and organizations.
 - Provide a list with the contact information of all attendees to the Episcopal Church Task Force on Individuals with Mental Illness and to the sponsoring diocese/network.

- Immediately report any serious issues or problems that arise during training to the chair of the Episcopal Church Task Force on Individuals with Mental Illness and the pastorally responsible diocesan/network leader.

Once those interested in becoming MHFA instructors agreed to fulfill the expectations, the Task Force determined how many people were interested in being certified in Adult MHFA, Youth MHFA, or both. In this step, it was encouraging to see that most respondents expressed interest in being trained in both Adult and Youth MHFA.

The training group explored the possibility of having Adult MHFA Instructor training combined with the Youth MHFA Instructor training for a week-long event. MHFA was not able or willing to combine the two courses. After combining the two courses was not an option, the training group hoped to be able to provide the Adult MHFA Instructor training and the Youth MHFA Instructor training immediately following to enable those who wanted to be trained in both programs to do so in one week. Unfortunately, this was not an option because each training event lasts three days, and MHFA Instructors do not work on the weekends.

Due to funding limitations, the Task Force faced a difficult decision regarding the type of MHFA Instructor training they could offer. Although the original intention was to provide both Adult and Youth MHFA instructor training, the financial constraints prevented this from being feasible. Upon realizing this, the Task Force carefully evaluated the situation and determined that providing the Adult MHFA instructor training would be the most advantageous given the higher number of individuals working with adults in various capacities in the Episcopal Church. Moreover, the Task Force recognized that there are existing programs like Keep Watch by the Diocese of Atlanta, which focus specifically on youth mental health and would serve as a valuable resource until additional funding becomes available for further training. By prioritizing Adult MHFA instructor training, the Task Force aimed to maximize the reach and impact of their efforts while also considering alternative options for supporting the mental health needs of youth.

The Task Force originally planned to host the MHFA Instructor training at the Kanuga Conference, Camp, and Retreat Center; however, it was more cost-effective to host the training at the Maritime Conference Center due to previous contractual agreements with the Episcopal Church. The Task Force coordinated between the General Convention Office and Mental Health First Aid to host an Adult Mental Health First Aid Instructor Training October 23 – 25 at the Maritime Conference Center.

After communicating the training dates, 12 individuals expressed their interest in attending the instructor training. Unfortunately, one person encountered a family medical emergency and could not participate as planned. As a result, on October 25, 11 individuals from 8 different Provinces completed the certification process and became certified Mental Health First Aid Instructors. In addition, the chair of the Task Force is also a certified instructor, and the group has identified other trained instructors in

the Episcopal Church who are willing to coordinate efforts. This has yielded an initial total of 15 trained instructors agreed to deploy their efforts for the church.

During the training, participants expressed keen interest in being certified as Teen MHFA instructors. This program directly teaches teens in grades 10-12, or ages 15-18, how to identify, understand, and respond to signs of mental health and substance use challenges among their friends and peers. The Task Force hopes to be able to offer this valuable training in the next triennium.

Sub Committee on Resource Creation

The Resource Group began its work with access to resource drafts from the prior Task Force as a starting point. The initial goal for resource development emerged from a desire to complete prior Task Force work on generating one-page resource guides related to specific mental disorders. The list of such desired resources was lengthy, as follows:

Overview of mental illness	Schizophrenia
Trauma and its consequences	Bipolar Disorder
Stigma and Other Barriers	Substance Abuse
Depression	Eating Disorders
Anxiety Disorders	Attention Deficit Hyperactivity Disorder

Additional possible topics were also considered, but these were starting points.

However, as the Resource Group met together, they considered the specificity of the topics above to be overly diagnostic. One of the core themes in both Mental Health First Aid (MHFA) and the National Alliance on Mental Illness (NAMI) is the importance of leaving diagnostic work to the professionals and assisting the public in a more general familiarity with the realities of mental health challenges and mental illness.

The Resource Group began to pivot in this direction prior to the Task Force's first in-person meeting in Cleveland, during months of online work together. In Cleveland, this pivot took shape in the form of completely new resource documents. Some resources from the prior drafts were used. However, these new documents focused not on the diagnosis of a person with mental illness but instead on the wider faith community responding to people experiencing any kind of mental health crisis or enduring challenge.

The first step was to identify the six focus areas for development into resources. The Resource Group identified the following areas:

General Overview of Mental Health and Illness	Care of Caregivers
Individuals in Mental Health Crisis	Care of Congregations
Individuals with Persistent Mental Illness	General Resources (national and local)

The Group sketched the consistent outline for the six resources. Each document was to include these elements:

- Introduction to the issue
- A parable illustrating the topic and offering a view into the experience.
- Best practices for approaching, accompanying, and responding to a person in distress.
- Spiritual resources, including liturgical and personal prayers, scriptures, and hymns.

When the group left Cleveland, three of the documents were 70% complete with the other three in draft outline. Over the summer, the group socialized the documents with faith groups in our communities to refine the content to be the most impactful and to build excitement for their publication.

At the October 2023 meeting in at the Maritime Center in Linthicum Heights, MD, the entire Task Force came together to complete, refine, and format all the resource documents. These print-ready documents are included in the appendix of this report and will be shared more broadly at General Convention.

Thanksgiving and Spotlight of Groups Doing Good Work in Mental Health

The Task Force is grateful for all of the congregations, schools, dioceses, networks, and faith communities across the Episcopal Church who have paved the way and set the foundations for our ministry with people with mental illness.

The Union of Black Episcopalians has done tremendous work in providing multiple MHFA trainings for its members and producing an excellent resource guide for ministry with people with different mental illnesses ([A Resource Booklet for Mental Health and the Spirit](#)).

In previous decades, the Episcopal Mental Illness Network (EMIN) provided resources online and worked to raise church-wide awareness regarding mental health and mental illness. Their work emerged with funding from General Convention, as launched in 1991 with Resolution D088

("Encourage Understanding of Mental Illness and Respond to the Needs of the Mentally Ill") that urged the Episcopal Church toward increased awareness, inclusion, and wisdom in pastoral support of people with mental illness and their families, equipping of clergy for more informed mental health ministry, partnerships with mental health organizations, and advocacy for better mental health care. The work continued through Resolution 2000-C032 ("Urge Congregations to Commend and Support Mental Health Support Groups"), which nudged Episcopal congregations' relationships with NAMI and other mental health networks. Financial support for EMIN arose and continued through funds given to the Task Force on Accessibility of that era.

Initial efforts from the Diocese of Delaware in 2015 requesting the Episcopal Church to focus more on mental illness helped spark the efforts leading to the first Task Force in 2018.

"Keep Watch" in the Diocese of Atlanta is an example of a church-based program focused on suicide prevention that is emerging across the church.

The Diocese of Pennsylvania has been working on decreasing the stigma of mental illness through several initiatives including offering training in Mental Health First Aid as well as various different house church programs to assist people in meeting them where they are.

Recently, the Diocese of Puerto Rico opened the St. Luke's Behavioral Health Center, provide specialized medical care and address mental health challenges throughout Puerto Rico, using a holistic approach that seeks to address physical, mental and spiritual needs. St. Luke's Episcopal Health System has been instrumental in supporting the church's mission to care for the well-being of all Episcopalians, but also for all people in Puerto Rico. St. Luke's behavioral health professionals provide workshops and lectures to clergy that offer tools for their self-care as well as the care of members of their congregations. To date, this important initiative has helped hundreds of people who have been affected by different local challenges, such as the impact of hurricanes, earthquakes, pandemics, among others.

The Task Force is grateful to The Diocese of West Texas (DWTX) Commission on Mental Health and all the clergy and lay leaders seeking training from Sanctuary Mental Health here so that, in DWTX, everyone—those with often stigmatized mental health needs, those in recovery, those on the highways and in the hedges—has a place at the table.

The Bishop's Commission on Social Justice and Community Care in the Diocese of Los Angeles, which formed in 2020 after the public murder of George Floyd, has pressed for reforms that move toward a vision of "gospel-based policing." The Commission intentionally expanded its focus to encompass mental health and illness in relation to its work on criminal justice and needed medical and therapeutic treatment access during and following incarceration.

Seminary of the Southwest launched in 2017 what has become a successful program, the Master of Arts in Clinical Mental Health Counseling, integrating theological and spiritual perspectives with professional counseling.

Many earlier church leaders, both lay and ordained, contributed care and helped advocate care to those experiencing various forms of mental health challenges, including substance use disorder. The Rev. Shoemaker's Oxford Group meetings helped shape what later became A.A.'s Twelve Steps for Recovery. Organizations and networks like Saint Francis Ministries and Episcopal Community Services have been providing services for people with substance use disorder, mental illness, behavioral disorders, and family dysfunction.

The Task Force wishes to highlight the different places of ministry in the Episcopal Church that have begun to embrace MHFA training for its clergy and church members.

The Diocese of Georgia in 2023 devoted its clergy conference to MHFA training for all its clergy.

Province V dedicated a day of its April 2024 provincial gathering to MHFA training for church leaders from multiple dioceses and ministry settings.

Various congregations across the Episcopal Church are hosting trainings in MHFA. One example, All Saints in Richland, WA, used MHFA to help its clergy and lay leaders learn skills to interact with the people without housing who come to their new cold-weather shelter. Another example, a group of four congregations in the Yakima Valley, WA used MHFA to strengthen their skills for ministries that touch the lives of many lower-income people in their communities. These are only a few examples of how Mental Health First Aid is already being embraced across the Episcopal Church.

We wish to recognize work done by the previous Standing Commission on Health that existed for the Episcopal Church's health-related ministry and advocacy, from its inception through 2009.

We continue to extend full-hearted gratitude to the leaders of the National Alliance on Mental Illness (NAMI) and wish to affirm all Episcopalians who participate in NAMI support groups, community awareness-raising and educational initiatives, boards, and advocacy efforts.

We are grateful for colleagues on other Task Forces and Commissions of the Episcopal Church who are developing resources and partnerships for overlapping areas of suicide prevention, addiction and recovery, cognitive disabilities, neurodivergence, and trauma in Indigenous and LGBTQIA+ communities. We are also grateful for diocesan commissions and church-wide networks whose work on matters of community care, social justice, criminal justice and legal aid, homelessness and housing, and public health intersect with important issues related to mental health and mental illness.

There are many other faith organizations that have produced excellent resources and trainings, many of which our Task Force has used and referenced in our materials generated for the Episcopal Church. These include the following:

Liturgical and theological resources for mental health and illness from the Church of England

The WISE Congregations (Welcoming, Inclusive, Supportive, Encouraging) initiative of mental health ministry created by the United Church of Christ.

The Spiritual First Aid resource and training process created by Jamie Aten at Wheaton College's Humanitarian Disaster Institute.

The resources gathered from multiple sources at the website of the Interfaith Network on Mental Illness, including Carole Wills' "Mental Illness Resources Guide."

The Task Force wishes to mark the significant value of resources produced for faith-based organizations by the American Psychiatric Association and the U.S. Offices of Faith-Based and Neighborhood Partnerships, to assist faith leaders and communities in awareness of mental health and mental illness and in best practices for positive engagement with people. We commend these for use across the Episcopal Church:

[*Mental Health: A Guide for Faith Leaders*](#),¹ American Psychiatric Association Foundation, 2018.

[*Compassion in Action: A Guide for Faith Communities Serving People Experiencing Mental Illness and Their Families*](#), The Partnership Center, Center for Faith and Opportunity Initiatives², U.S. Department of Health and Human Services, July 2020.

The Task Force is particularly grateful for the emerging partnership with Mental Health First Aid as offered through the National Council for Mental Wellbeing. This foundational training for clergy and laity across the Episcopal Church will be easily joined with other important resources like Critical Incident Management Training (through the Crisis Prevention Institute), Spiritual First Aid (noted above), Crisis Intervention Team training (through C.I.T. International) and Psychological First Aid (a World Health Organization resource for post-disaster help), for a robust menu to develop skills and confidence in Church members.

¹ [Mental Health: A Guide for Faith Leaders, https://www.psychiatry.org/File%20Library/Psychiatrists/Cultural-Competency/Mental_Health_Guide_Tool_Kit_2018.pdf](https://www.psychiatry.org/File%20Library/Psychiatrists/Cultural-Competency/Mental_Health_Guide_Tool_Kit_2018.pdf)

² [Compassion in Action: A Guide for Faith Communities Serving People Experiencing Mental Illness and Their Families https://www.hhs.gov/sites/default/files/compassion-in-action.pdf](https://www.hhs.gov/sites/default/files/compassion-in-action.pdf)

Introduction to the Resolutions

The Task Force proposes seven resolutions to continue its work on strengthening the ministry of the Episcopal Church related to mental health and illness beyond the 2022-24 triennium. Below is a brief summary of these resolutions.

A073 A Standing Commission for Human Health and Wellness calls for the creation of a standing commission that focuses on all aspects of Human Health and Wellness which would continue much of the work that this Task Force has focused on.

A074 Completing Mental Health Ministry Curriculum for Clergy calls for the continuation and completion of all sections of the Mental Health Ministry Curriculum, provided herein, for the education and training of Episcopal clergy in regard to mental health.

A075 A Directive for Clergy Mental Health Ministry Training calls on the standing commission to work collaboratively in training clergy and postulants in the curriculum for Mental Health Ministry, aiming toward fulfillment of the Episcopal Church's expectation to train all its active ordained clergy, and to examine the potential for canonically requiring this training for all active clergy.

A076 Strengthening of Churchwide Training in Mental Health First Aid aims to expand the pool of MHFA instructor with training in Adult, Youth, and Teen certification instruction, to deploy the entire pool of instructors in the dioceses and ministry settings of their Provinces, and to fund their training and deployment.

A077 Additional Guidance for Inclusive and Metaphorical Language calls the Episcopal Church to include non-ableist and non-stigmatizing language in the liturgies and communications.

A078 Promote equity and to Reduce differences in Mental Health Outcomes encourages the church to advocate for people experiencing Mental Health challenges.

A079 Mental Health Sunday encourages the church to adopt the Sunday closest to October 10th as Mental Health Sunday and encourages the church to pray for people experiencing Mental Health Challenges.

Proposed Resolutions

A073 A Standing Commission for Human Health and Wellness

Resolved, That the 81st General Convention amend Canon I.1.2.n by adding a new subsection 6 thereto, to read as follows:

I.1.2.n

6. *A Standing Commission on Human Health and Wellness. It shall be the duty of the Commission to*

i. Develop and recommend policies, strategies, programs, and resources to the General Convention and the Episcopal Church that support and strengthen the church's ministry with all God's people as they seek to maintain and improve their physical, mental, spiritual, relational, and emotional health.

ii. Coordinate the development of resources to strengthen human flourishing and to support ministries of hope and healing of both physical and mental health.

iii. Facilitate the development of basic skills among all members of the church for care, support, inclusion, and advocacy for people wrestling with physical and mental health challenges.

iv. Develop and oversee training for all clergy and key lay leaders in mental health ministry.

v. Draw together the insights, best practices, and resources developed by varied Church bodies to address matters of human health and wellness, including work done on ministry in relation to substance use, suicide prevention, trauma and recovery, neurodivergence, developmental disability, challenges in aging, pain, and chronic illness, and to strengthen the response of faith communities in partnership with broad-based and local organizations.

vi. Expand resources and encourage practices of ministry that support mental and physical health, assist faith communities to establish habits and structures of welcome, inclusion, encouragement, empowerment, and advocacy for persons of all ages facing mental, physical, relational, emotional, and spiritual health challenges, and provide helpful aids for healthy living.

vii. Collaborate with other commissions, ecumenical partners, invested experts, and public agencies and organizations to create optimal resources and trainings.

viii. Collaborate in seeking of funding sources and grants, and in deployment of funds, that support training for clergy, lay leaders, and faith communities.

ix. Partner with other Church bodies in education and advocacy about social and economic conditions that either strengthen or harm human health and wellness, such as access to housing, healthy food, education, work with dignity, and health services, as well as freedom from violence, stigma, and racism.

x. Oversee the creation and content review of a sustained web presence that provides a gateway through links to robust resources for support and advocacy for human health and wellness.

xi. Direct curriculum on mental health ministry for clergy, postulants, and lay leaders, in consultation with the Standing Commission on Formation and Ministry Development and other Church partners as appropriate.

xii. Coordinate with networks and initiatives related to health and wellness both within and beyond the Episcopal Church, including but not limited to the Assembly of Episcopal Healthcare Chaplains, Allies for Recovery in the Episcopal Church, the Union of Black Episcopalians, the Episcopal Community Service in America, CREDO, St. Francis Ministries, the Interfaith Network on Mental Illness, NAMI's FaithNet, Lutheran Family Services, and varied faith-based wellness programs.

And be it further.

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget, and Finance to allocate \$75,000 to fund the work of the Standing Commission for the 2024-2027 triennium.

EXPLANATION

Over the past decades, the work of the Episcopal Church in ministry and advocacy regarding matters of human health and wellness has been steady but uneven, moving in tides of interest from triennium to triennium. Resolutions have been affirmed and Task Forces have been formed to conduct research, do work, and promote policies and programs for the Episcopal Church in regard to specific issues related to human health and wellness. Across the last 50 years, there have been fluctuating seasons of focus on aging, neurodivergent individuals and their families, substance use and addiction, suicide risk and prevention, reproductive health, maternal and infant health, palliative healthcare, childhood and adult disability, grief and bereavement, mental health, stress, and trauma. Much has been accomplished over the decades in affirming varied aspects of health and in seeking to address challenges to health and wellbeing. In each area of interest and effort, it has been challenging to sustain interest and maintain continued effort for the Episcopal Church. Different interim bodies have gone about good work and launched fresh proposals and program initiatives, but with rare interaction with each other about common or overlapping goals and plans. Additionally, Task Forces are short-term interim bodies; work that is partially or fully completed during one Task Force's life cycle may not be picked up or continued due to shifting interests of new triennial cycles, and some work may end up

repeated and reduplicated years later due to loss of continuity. Furthermore, there are areas of physical health that are largely untouched.

Two cases in point:

1) There have been fluctuating seasons of increasing and waning focus on mental health, with resolutions in 1991 and 2000 encouraging increased awareness of mental illness and support for those facing mental health challenges, and with a period of effort in creating an Episcopal Mental Illness Network (EMIN) as a web-based connective community. This network lost steam when it lost funding to support its continuing efforts, and its last website postings were in 2015. In the meantime, another resolution focused regarding families with children with neurodivergent challenges (ranging from attention deficit to autism) was brought forward and affirmed in 2012, but without clear interface with EMIN. A new Task Force on mental health was created in 2018 and renewed in 2022. At the same time in 2022, a wide array of other resolutions related to mental health (including substance use addiction and recovery, suicide risk and prevention, and trauma) resulted in the formation or continuation of other Task Forces, or referral of work to a Church Center staff office.

2) There was previously a Standing Commission on Health. This commission was last mentioned in 2009 and discontinued in the 2012 General Convention's move to eliminate most Standing Commissions. Since that time, some Standing Commissions have been reinstated or freshly launched. This movement toward a return of Standing Commissions has come as a result of recognizing the difficulty of developing continuity and sustained investment in churchwide initiatives when relying solely on task forces or on single Church Center officers.

These examples illustrate the weakness of largely resolution-driven approaches to developing steady and sturdy ministries that support human health and wellness. In order to build continuity and collaboration into such development for the sake of the whole Church in all its orders of ministry, a more enduring body is needed, in the form of a canonically confirmed Standing Commission.

The scope of this new commission will be to address matters of ministry in the forms of welcome, inclusion, support, encouragement, empowerment, and advocacy for people facing challenges in physical, mental, emotional, relational, or spiritual health; and to support churchwide efforts to strengthen health and wellbeing. Issues to address in the scope of human health and wellness will include a fuller array of mental health challenges and cognitive challenges including neurodivergence and developmental disabilities, personality disorders, substance use addiction, and the impacts of trauma, disaster, abuse, and moral injury. The scope will address physical health challenges including disease, enduring injury, disability or physical limitation, and cardiovascular, pulmonary, and gastrointestinal health. The realities of age-related changes over the course of human life and the unique challenges that can emerge at different points in life will help guide this commission toward best practices. Key focal points in all of the commission's work will be the importance of affirming the

dignity of all persons, the recognition of identity-related struggles that emerge with each health challenge faced, the need to combat cultural patterns of stigma and pigeon-holing, and the gifts of God in food, sleep and rest, and physical activity to sustain and strengthen human lives.

With such an enduring charge, this commission can work steadily on multiple fronts of ministry supporting human health and wellness, collaborating in development and sharing of resources across church bodies. Subcommittees working on specific issues will interact with one another and help refine each other's focal work in ways that lead to a more cohesive, holistic approach. With an enduring commission, it will be possible to encourage sustained learning and development of the Episcopal Church's capacity for ministry with people facing all sorts of health-related challenges. Training and resources can be developed and supported to strengthen capacities of lay members, deacons, priests, and bishops in nurturing wellness and being helpful companions in illness. An enduring commission will establish enduring collaborative relationships and partnerships with other effective organizations, agencies, and networks engaged in the work of human health and wellness. To build the strongest possible ministry capacities in the church for health, such partnerships will need to be with religious and secular organizations that represent the varied cultures within and between the nations served by the Episcopal Church.

Funding requested will support meetings for this new Standing Commission. Additional funding through other resolutions will support further training and deployment of Mental Health First Aid instructors that will include training for those working with youth, and creation of modules for the curriculum for clergy and lay leaders in mental health ministry and translation of the curriculum for Spanish-speaking communities.

A074 Completing Mental Health Ministry Curriculum for Clergy

Resolved, That the 81st Convention of the Episcopal Church direct the appropriate body to continue and complete the development of all sections of the Mental Health Ministry Curriculum for the education and training of Episcopal clergy in ministering to persons and families experiencing mental health challenges in the church; and be it further,

Resolved, That \$20,000 be allocated for that work in this triennium; and be it further,

Resolved, That all curriculum modules be translated into all relevant languages in use by the Episcopal Church; and be it further,

Resolved, That \$14,000 be allocated for that work in this triennium.

EXPLANATION

According to the National Alliance on Mental Illness, 1 in 5 U.S. adults experience mental illness each year, 1 in 20 U.S. adults experience serious mental illness each year, 1 in 6 U.S. youth aged 6-17 experience a mental health disorder each year, 50% of all lifetime mental illness begins by age 14, and 75% by age 24. Suicide is the 2nd leading cause of death among people aged 10-14.¹

Faith communities are on the leading edge of communities in interfacing with people experiencing a mental health challenge, including, but not limited to, mental health crises, mental illness diagnoses, and substance use disorders.

The Church can be a setting in which people experiencing a mental health challenge can feel that they will not be judged, or seen to be "weak" or stigmatized. In order meet the needs and respect the dignity of people experiencing, clergy and those seeking ordination need tools and training to deal confidently and pastorally with the issues that arise in the various setting in which they serve.

Recognizing this need, in 2022, the 80th General Convention passed resolution A109, which called for the creation of a curriculum to address mental health and that "all those to be ordained from January 2024 onward be trained" as well as recommending "the training of all active priests, deacons, and bishops in this curriculum for mental health and mental illness awareness."

The Task Force on Individuals with Mental Illness recognizes that, for many reasons including the short time frame between the 80th and 81st General Conventions, having training prepared for all active clergy as well as all those discerning a call to ordained ministry was a tall order. A draft of the curriculum was created and shared as part of the Task Force report. However, it is not ready for immediate implementation. The Task Force believes that this curriculum needs to be further refined and developed, with each section prepared for delivery in online and in-person formats. The curriculum in its complete form also must be translated and culturally adjusted for different ethnic and racial communities. The previous curriculum has been a joint effort between the Task Force on Individuals with Mental Illness and a sub-committee of the Standing Commission on Formation and Ministry Development, largely driven by the Task Force on Individuals with Mental Illness. This work is not strictly speaking a matter of formation but of equipping the saints with capacities and skills for a specific form of ministry in their faith communities and the public square. Moving forward, the Task Force recommends keeping this work with any bodies focused on Human Health and Wellness.

Completing a robust, centralized curriculum is an essential part of clergy education for mental health. It ensures that there is consistent and equitable learning across cultures and languages, establishes clear learning goals, and adapts to a changing world.

A075 A Directive for Clergy Mental Health Ministry Training

Resolved, That the 81st General Convention direct the President of the House of Deputies to assign to a church body the task of beginning training clergy and postulants in the curriculum for Mental Health Ministry as previously directed in 2022-A109, examining the potential for canonically requiring this training for all active clergy, and reporting to the 82nd Convention on the number of clergy trained and offering a proposal for implementation of training requirement.

EXPLANATION

According to the National Alliance on Mental Illness, 1 in 5 U.S. adults experience mental illness each year 1 in 20 U.S. adults experience serious mental illness each year 1 in 6 U.S. youth aged 6-17 experience a mental health disorder each year 50% of all lifetime mental illness begins by age 14, and 75% by age 24 Suicide is the 2nd leading cause of death among people aged 10-14.^[1]

Faith communities on the leading edge of communities in interfacing with people experiencing mental health challenges, including, but not limited to, mental health crises, mental illness diagnoses, and substance use disorders. Church can be a setting in which people experiencing mental health challenges can feel that they will not be judged or seen to be “weak” or stigmatized in various ways. In order meet the needs and respect the dignity of people experiencing, clergy and those seeking ordination need tools and training to deal with the issues that arise in the various setting in which they serve.

Recognizing this need, in 2022, the 80th General Convention passed resolution A109, which called for the creation of a curriculum to address mental health to be created and that “all those to be ordained from January 2024 onward be trained” as well as recommending “the training of all active priests, deacons, and bishops in this curriculum for mental health and mental illness awareness.”

This resolution instructs the Standing Commission for Human Health and Wellness take steps toward fulfilling the goals set in resolution 2022-A109 by working with other church bodies in delivering the curriculum for Mental Health Ministry with postulants and ordained clergy. The new Commission will also consider the potential for codifying such training in the canons of the church alongside equivalent trainings on prevention of abuse and the church’s teaching on racism. The Commission can bring a realistic timeframe for the training of active clergy in a curriculum that is in development, beginning with delivery of certification in basic Mental Health First Aid, an evidence- and research-based, peer-reviewed training, which the General Convention training provision called for in resolution 2022-A108.

Future canonical adjustment requiring all active clergy to be trained in a curriculum for mental health and wellness is crucial because it recognizes the significant role clergy play in providing support and guidance to individuals within their communities of faith and their wider ministry settings. Mental health training equips clergy with the knowledge and skills needed to offer effective pastoral care to those struggling with mental health issues, aid families of individuals facing mental health challenges,

attend more clearly to their own mental health, and foster strengths and skills in faith communities for welcoming, including supporting, strengthening, encouraging, empowering, and advocating with people facing mental health challenges. By reducing stigma, fostering early identification and intervention, and promoting a holistic approach to well-being, this holistic curriculum ensures that clergy can better meet the mental health needs of congregants. Moreover, by prioritizing the mental health and well-being of clergy themselves, this curriculum and training supports a healthier and more resilient clergy community.

[\[1\] https://www.nami.org/mhstats](https://www.nami.org/mhstats), accessed 10/27/23.

A076 Strengthening of Churchwide Training in Mental Health First Aid

Resolved, That the 81st General Convention of the Episcopal Church authorize and fund the training of additional Mental Health First Aid (MHFA) instructors in the Episcopal Church to provide local, diocesan, and provincial trainings in both Adult, Youth, and Teen-2-Teen Mental Health First Aid, to expand the existing MHFA trainer pool and thus increase access to training for clergy and lay leaders across all Provinces of the Episcopal Church, with training to be completed by May 2027, so that they will become available as resource trainers for the dioceses in each Province; and be it further,

Resolved, That the 81st General Convention request that the Joint Standing Committee on Program, Budget and Finance allocate \$102,000 from the Episcopal Church triennium budget appropriation for the funding of this work; and be it further,

Resolved, That the 81st General Convention recommend the exploration of MHFA International resources with the intent to expand MFHA training into non-English-speaking countries to provide trainer coverage as needed for all Provinces; and be it further,

Resolved, That the 81st General Convention authorize and fund the deployment of MHFA instructors, including basic travel-related support, across the next three trienniums to train all active priests and deacons by 2033 for an estimated cost of \$159,000; and be it further,

Resolved, That the 81st General Convention request that the Joint Standing Committee on Program, Budget and Finance allocate \$53,000 for that work in this triennium; and be it further,

Resolved, That \$10,800 be allocated for the generation of printed instructional resources for the diocesan MHFA trainings.

EXPLANATION

Building on the work of the prior Task Force on Individuals with Mental Illness, we continued the focus on the provision of Mental Health First Aid (MHFA), which provides consistent training with resources that are easily adopted on a large scale. MHFA training helps people develop the skills to assist individuals experiencing mental health crises and link them to appropriate professionals and supportive networks. The training helps clergy and lay leaders to understand some of the experiences of those with mental illness and helps to destigmatize the realities living with of mental illness.

Recognizing the importance of training in MHFA, in 2022, the 80th General Convention passed resolution 2022-A108, which called for the authorization and funding for at least 15 regional trainers. The work of the Task Force on Individuals with Mental Illness in this most recent triennium resulted in the training of 11 Adult MHFA instructors covering 8 provinces. While this was an excellent move forward, additional trainers are required to provide more thorough provincial coverage, as well as to offer instruction in Youth and Teen-2-Teen MHFA.

This resolution calls for the training of additional Mental Health First Aid instructors in the Episcopal Church to provide local, diocesan, and provincial trainings in Adult, Youth, and Teen-2-Teen Mental Health First Aid, and for funding to support their training and provide basic travel-related support for all instructors' deployment.

The funding request for additional trainers will cover 14-16 instructors in each of Adult, Youth, and Teen-2-Teen MHFA, at a cost of \$34,000 for each track (including travel) or \$102,000 in total. This will yield a total of 53-59 instructors trained specifically for instruction in the Episcopal Church, to be joined by other Episcopal MHFA instructors already trained and active, who together will offer MHFA certification trainings across the church. Per year, their trainings will yield 2500-3500 Episcopalians certified in MHFA; per triennium, 7500-10,500 certified Episcopalians; and by the end of three trienniums, up to 31,500 certified Episcopalians.

The funding of travel-related expenses in deployment of MHFA instructors for active clergy and postulant training and other diocesan or ministry setting trainings will significantly reduce the cost per trainee for each certification course. The deployment of MHFA instructors over the next three trienniums includes roughly 213 trainings for the approximately 4,000 priests and 2,400 deacons, as well as all active bishops, comprising all active clergy by 2033. More trainings offered by instructors will equip lay members with the same fundamental knowledge and skills. The funding request for this deployment is \$53,000 per triennium, or \$159,000 in total.

Modest funding is also requested to support and reimburse instructors for production of supplementary printed materials to aid in the training being offered.

A077 Additional Guidance for Inclusive and Metaphorical Language

Resolved, That the 81st General Convention direct the Standing Commission on Liturgy and Music to include additional guidance in The Guidelines for Expansive and Inclusive Language regarding non-stigmatized language in the inclusive language section and non-ableist language in the metaphorical language section when drafting revisions and new liturgical materials; and be it further

Resolved, That when liturgical materials in languages other than English are developed for use in the Episcopal Church that they follow, to the greatest degree possible, the spirit and intent of these guidelines; and be it further

Resolved, That the 81st General Convention commend these guidelines to all persons who write or speak on behalf of the church for their serious reflection and consideration; and be it further

Resolved, That these guidelines be referred to Dioceses, Interim Bodies of General Convention, Executive Council and related bodies, Provinces, Church Publishing, and other organizations of the church for serious reflection and consideration when writing, speaking, or educating on behalf of the church.

EXPLANATION

Language is important for ensuring clear and concise communication of ideas. However, certain idioms and expressions have become hurtful for those in our communities. Stigmatized and ableist language prevent affected communities from growing beyond their stereotypical place in society.

Stigmatized language affects how individuals feel welcomed by a community. It can be regionally specific and culturally informed. As an international body, we need to make sure that we are respecting the dignity of all human being through words. Some words will be harder to give up and we will fight for favorite phrases that have long been divorced from their stigmatized origin. Thoughtful language is the first step in the invitation to the welcoming love of the church. We have seen this welcome in the symbols we adopt. It is now time to reflect on how language becomes a barrier to welcome, a barrier to reaching people in our communities. Most resources will highlight terms related to Mental Health and Substance Abuse.

Ableist language perpetuates a standard of a perfect human being. We know that only through God may we be made perfect. How that perfection is manifested on earth is not for our judgement. Ableist language abounds in our sayings and reflects the deeply imbedded use of metaphors in how our society describes and connects when communicating. Phrases like, ‘falling on deaf ears’, ‘the blind leading the blind’, ‘dumb’ and ‘lame’ all come from and perpetuate the societal ignorance of the perceived limitations of individuals with disabilities. Additionally, when discussing action, we must be intentional about how we refer to the action and what is being accomplished. To ‘go on a Walk’ puts an unintentional focus on

the action of walking, which can distance individuals that use alternative methods to move from one place to another. Replacing this language takes creativity to understand the invocation to participate.

Ableist and stigmatizing language can also overlap. Terms like ‘crazy’, ‘spastic’, and ‘idiot(ic)’ started as stigmatizing language to denigrate the populations living with mental, physical, and neurological health conditions. Continued usage transformed these into ableist language as people use them to distance and separate what is perceived perfect from the imperfect.

As we look through the liturgies of the church, the formation documentation, the prayers and spiritual resources, we should reflect on how small changes to how we refer to the saints, how we ask for intercessions and give thanksgiving to be inclusive to all (or to not be exclusive to some). As we refer to scripture, we need to make sure we do not perpetuate the sins of the past with unhealthy language around the message of the stories and lessons from the old and New Testament. The hope of this resolution is for the Standing Commission on Liturgy in partnership with other bodies, like Church Publishing (and the potential Standing Commission on Human Health and Wellness) to offer guidance through the language they propose to change.

Specifically, we want to make sure that:

- Under the Inclusive Language Section on Page 3, please add a sixth point in the list stating, “Stigmatizing language should be replaced with affirming statements and words that are more relatable and promote understanding.”
 - You can help eliminate the misunderstanding and stigma that prevent people from speaking up and getting support by choosing words that are clearer and more neutral.

Reference: <https://www.nami.org/NAMI/media/NAMI-Media/Infographics/NAMI-Language-Matters.pdf> (October 2023)
 - Stigmatizing language – such as “crazy” — perpetuates negative perceptions, which can result in people to be excluded from jobs, housing, social activities and relationships. Additionally, people may begin to believe the negative things that others say about them, delaying them on their recovery journey.

<https://www.mentalhealthfirstaid.org/2022/04/use-person-first-language-to-reduce-stigma/>
(October 2023)
- Under the Metaphorical Language Section on Page 3, please add a second point. The second point should be, “Ableist language should be reviewed against the intent and action of the speaker and call. Ableism perpetuates a “normal” human experience to life that places artificial barriers around what is considered perfect. Language used should reflect the intent, not the action used to accomplish the intent. As an example, ‘We shall go with Jesus’, rather than ‘We shall walk with Jesus.’”

- Ableism is defined as discrimination or social prejudice against people with disabilities based on the belief that typical abilities are superior. It can manifest as an attitude, stereotype, or an outright offensive comment or behavior. When it comes to language, ableism often shows up as metaphors (“My boyfriend is emotionally crippled.”), jokes (“That comedian was hysterical!”), and euphemisms (“He is differently abled.”) in conversation.

<https://hbr.org/2020/12/why-you-need-to-stop-using-these-words-and-phrases> (October 2023)

- Many people don’t mean to be insulting, and a lot have good intentions, but even well-meant comments and actions can take a serious toll on their recipients.

<https://www.accessliving.org/newsroom/blog/ableism-101/#:~:text=Ableism%20is%20the%20discrimination%20of,defines%20people%20by%20their%20disability>. (October 2023)

Concrete Examples of Stigmatizing Language as published by the National Institute of Health:

Instead of...	Use...
Addict	Person with substance use disorder ¹
User	Person with OUD or person with opioid addiction (when substance in use is opioids)
Substance or drug abuser	Person with Substance Use Disorder
Junkie	Person in active use; use the person’s name, and then say, “is in active use.”
Alcoholic	Person with alcohol use disorder
Drunk	Person who misuses alcohol/engages in unhealthy/hazardous alcohol use
Former addict	Person in recovery or long-term recovery
Reformed addict	Person who previously used drugs
Habit	Substance use disorder Drug addiction

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Instead of...	Use...
Abuse	For illicit drugs: Use
	For prescription medications: Misuse Used other than prescribed
Clean	For toxicology screen results: Testing negative
	For non-toxicology purposes: Being in remission or recovery Abstinent from drugs Not drinking or taking drugs Not currently or actively using drugs
Dirty	For toxicology screen results: Testing positive
	For non-toxicology purposes: Person who uses drugs
Addicted baby	Baby born to mother who used drugs while pregnant
	Baby with signs of withdrawal from prenatal drug exposure
	Baby with neonatal opioid withdrawal/neonatal abstinence syndrome
	Newborn exposed to substances

<https://nida.nih.gov/nidamed-medical-health-professionals/health-professions-education/words-matter-terms-to-use-avoid-when-talking-about-addiction>

A078 Promote Equity and to Reduce Differences in Mental Health Outcomes

Resolved, That the 81st General Convention of the Episcopal Church hereby encourage that Congress enact legislation on the following package of policies that would serve to promote equity and to reduce differences in mental health outcomes: address implicit bias and unconscious bias in mental health diagnostics and treatment; address data challenges; address Social Determinants of Health; and invest in mental healthcare professional diversity; better mental healthcare treatment available; and be it further

Resolved, That the 81st General Convention of the Episcopal Church urge Episcopalians to prayerfully consider how they can support individuals with mental illness and their caregivers; and be it further

Resolved, That the Episcopal Church call on all elected and appointed officials to advocate for policies to raise the quality and availability of mental health coverage for all people in states and local areas; and be it further

Resolved, That this Convention charges the dioceses and parishes of the Episcopal Church with advocating for those same policies in their communities and states; and be it further

Resolved, That this Convention transmit a message to each diocese of the Episcopal Church with a copy of this resolution before each Diocesan Convention following the 81st General Convention; and be it further

Resolved, That the Episcopal Church recognize that issues with mental illness, access to diagnosis and effective treatment, and lack of appropriate treatment for untreated or under-treated pain affect all communities, and there is a disproportionate effect on persons of color, persons with disabilities, and those affected by poverty; and be it further

Resolved, That congregations be urged to pray weekly during the Prayers of the People for those affected by mental illness and their families; and be it further

Resolved, That the individuals involved in undertaking this work remain cognizant of its relationship to other issues of serious concern to the Episcopal Church: gun violence prevention, substance use, suicide prevention, and trauma related to gender, sexual identity, or military service; and be it further

Resolved, That the 81st General Convention, consistent with established policies and procedures, refer this Resolution to the Office of Government Relations, so that it may take all actions necessary to accomplish the intentions and purposes of this resolution.

EXPLANATION

Mental Health is Health. The church can help to advocate for the policies that work, for the policies that are impactful, for the policies that will make a difference. Promoting legislation to advocate for policies addressing mental health coverage and access, as well as other critical issues, is of great importance to the Episcopal Church. Mental health is an essential aspect of overall well-being, and access to mental health services is crucial for individuals with mental illness.

By advocating for legislation that promotes mental health coverage and access, the Episcopal Church strives to ensure that individuals have the necessary resources and support to address their mental health needs.

Individuals with mental illness are more likely to experience trauma and violence. Other major topics of concern in the church such as gun violence prevention, substance use prevention and recovery, suicide prevention, and trauma related to gender, sexual identity, or military service intersect with and impact individuals with mental illness.

By promoting legislation to advocate for policies addressing these serious concerns, the Episcopal Church aims to create a more just, compassionate, and inclusive society, where individuals can access the necessary resources and support to address their various needs.

A079 Mental Health Sunday

Resolved, That the 81st General Convention of the Episcopal Church designate as Mental Health Awareness Sunday the Sunday closest to October 10th, which is World Mental Health Day; and be it further

Resolved, That the common objective is to raise awareness of the impact that stigma has on preventing open dialogue about mental health and mental illness with our families, our Church, and our communities; and be it further

Resolved, That the Episcopal Church encourage the education of its clergy and laity on how to support individuals with mental illness and their caregivers; and be it further

Resolved, That the 81st General Convention of the Episcopal Church send this resolution to each Diocese of the Episcopal Church to post a reminder through their primary communication channels to encourage participation in Mental Health Awareness Sunday; and be it further

Resolved, That we add our voices and prayers with those around the world seeking care and attention to treat mental illness.

EXPLANATION

Mental illness thrives in the darkness, the darkness of isolation, the darkness of ignorance, and the darkness of negative stigma. It is through public acknowledgement that we can bring relief, bring support, bring the light and love of Christ to all God's children. Just talking about mental illness can save a life. We hope that the church talks about Mental health and wellness throughout the year. The Episcopal Church is rooted in the tradition of corporate worship. If all faith communities in an area are focusing on Mental Health, it will magnify the impact in the world.

As for the date, October 10th, this is the globally recognized date for mental health awareness since 1992. We would like to recognize that In the United States of America, the entire month of May is designated Mental Health Awareness Month since 1949 and supported by various federal agencies. Additionally, the US honors National Minority Mental Health Awareness Month in July since 2008. There are many other national and global recognition dates that challenge the church's calendar for the number of celebrations. We have focused on the most inclusive of the celebration dates.

October is also an advantages time of year for reflecting on Children and Youth Mental Health as it is generally the start of the new school year. The inter-generational possibilities to discuss the stress of life will help to normalize conversations around the impact of stress and burn-out on Mental Wellness.

Once we have started to reduce the stigma to mental illness through these annual celebrations, we expect leaders to want to go deeper in how they can respond to the epidemic of mental illness. This is where resources and education are important. The Task Force on Individuals with Mental Illness has prepared a first set of resources which are shared as part of the 81st General Convention Bluebook. The Task Force is also recommending Mental Health First Aid as a preferred training for most faith communities. We commend other resources from the organizations and groups that are mentioned in the Bluebook Report Thanksgivings.

Lastly, we know that it can be simple to pass a resolution at General Convention, but much harder to implement. We hope by commending this resolution to communication offices of our various diocese, it will help remind our churches of the work done at convention. We understand that not all parishes or faith communities will be able to participate in Mental Health Awareness Sunday. But for those that are able, a gentle reminder can act as a launch pad for sharing ideas across networks. This also gives a chance for Diocesan level initiatives about mental health to have time in the spotlight.

As a church, it is only right that we close in a prayer. Prayer will not solve a medical issue, but it comforts and reminds us of the strength that God provides in times of difficulty.

Supplementary Materials

Instructors for Mental Health First Aid

As mentioned in the Mental Health First Aid Subcommittee report, below are the names of the first set of trainers that are available for provinces and dioceses to host Mental Health First Aid training per the guidance mentioned in the report. This list will be updated as new trainers are added. We know that there are other Episcopalians that are instructors in Mental Health First Aid in many of the dioceses, and we recommend adding them to your call sheet as well before circulating this list to parishes and other faith communities.

Certified Adult Mental Health First Aid Instructors

Province	Diocese	Name	Telephone	Email
I	Massachusetts	The Rev. Spencer Hatcher	240-527-7106	spencer@bchcenter.org
I	Western Massachusetts	Rev. Jason Burns	412-522-4456	deaconjburns@gmail.com
II & IX	Puerto Rico	Luis Collazo, MHSA	939-290-1065	luiscollazo70@yahoo.com
III	Pittsburg	The Rev. Carter Hawley	541-222-0933	chawley@episcopaldeacons.org
IV	Alabama	Linda Foster, Ph.D.	205-305-8085	drhindafoster@gmail.com
IV	Alabama	Cindy Wiley, Ed.S, LPC	205-774-2442	cindy@stmarysoth.org
IV	Atlanta	Tammy E. Pallot, M.S.	478-954-5441	tammy@stfrancismacon.org
IV	Atlanta	Rev. Jess W. Speaker, III	301-648-7584	jess@stcatherines.org
V	Eastern Michigan	McKenzie Bade-Knill	810-434-5982	mckenzie@campchickagami.org
VI	Iowa	The Rev Laurie Finn	520-981-4328	lauriefinn2@gmail.com
VIII	Olympia	The Rev. Jedediah Fox	425-408-2623	the.rev.jedediah.fox@gmail.com



VIII

Spokane

The Rev. David Gortner,
Ph.D.

510-734-1066

dgortner@vts.edu

Mental Health Basics for the Episcopal Church

"Come to me, all you who are weary and are carrying heavy burdens, and I will give you rest. Take my yoke upon you, and learn from me, for I am gentle and humble in heart, and you will find rest for your souls. For my yoke is easy, and my burden is light." (Matthew 11:28-30)

Mental Health and Mental Illness

Mental health is "a state of mental well-being that enables people to cope with the stresses of life, realize their abilities, learn well and work well, and contribute to their community." (WHO, 2023). In all stages of life, it profoundly impacts our thoughts, emotions, and behaviors, shaping how we handle stress, work and learn, interact with others, make decisions, and contribute to life in the world.

Report to the 81st General Convention

Throughout our lives, we may encounter challenges that affect our mental health, influencing our thinking process, mood, and actions. There are several contributing factors to mental health problems, including biological elements like genes or brain chemistry, life experiences such as trauma or abuse, as well as a family history of mental health issues.

Early Signs and Symptoms ³	Continuing or Worsening signs and Symptoms	Crisis
Tired-looking Disheveled clothing Sadness Worry Difficulty concentrating or focusing on home, school or work Indecisiveness An emerging pattern of showing up late for or canceling personal and professional commitments	Withdrawing from family and friends Absenteeism or “presenteeism” Odd or erratic behavior Declining personal hygiene Hopelessness or despair Anger or rage Increasing self-blame or self-criticism Distorted body image	May become a crisis: Panic attack Aggressive behaviors Substance misuse Traumatic event Non-suicidal self-injury Immediate crisis: Suicidal thoughts and behaviors Medical emergency Severe alcohol or drug effects Severe psychotic states

Caring for individuals, families, and congregations addressing the mental health needs of the church becomes essential in creating vibrant, welcoming, Christ-centered relationships and communities. In this way, the Episcopal Church recognizes the need to meet individuals, families, and clergy where they are and provide sacred, supportive spaces to grow in love with God and one another. To address some of these issues, the Episcopal Church recognizes the need to support the mental health of our faith communities while bearing witness to the unique challenges of the time.

The stigma surrounding mental health continues to prevent many from coming forward and seeking mental health care. People are often ashamed to discuss their symptoms and may be reluctant to seek treatment and support because of concerns about what others will think. Studies show that with proper care and treatment, people with mental health challenges get better, and many recover completely.

Whether responding to mental health crises or managing ongoing, persistent mental health issues, we must prepare to meet the needs of our faith communities with compassion and grace.

Do these stories seem familiar in your faith community?

An active member has stopped coming to services regularly and often states reasons they cannot attend meetings of groups of which they are a part. They are difficult to connect with and are dropping other activities outside of church. When they are at church, they appear distracted, withdrawn, and irritable.

A previously explorative, curious, engaged, and outgoing child now appears uninterested and angry. The child no longer wants to participate in Sunday School or other activities, is resistant, and acts belligerently.

A senior citizen is now repeating discussions with you and does not remember details of recent discussions. They hesitate to participate in social functions with larger crowds or new people. They fight against any changes to their routines.

A youth has recently expressed having thoughts about taking their own life. They have recently been bullied in school and social media. They stopped going to youth group.

A well-known young adult shows up to church on Sunday morning but seems unaware of what is happening around them, is dressed inappropriately and/or is disheveled and unwashed and appears to have disorganized conversations and thoughts.

A youth no longer wants to eat dinners with the youth group and has changed their clothing style to baggy clothing that appears to hide their body. They no longer wear anything but long sleeves, no matter the weather.

³ Sources: *NAMI.org*, and *Mental Health First Aid USA, 2020*.

Fast Facts

1 in 5 U.S. adults experience mental illness *each* year

2 in 5 U.S. adults experience mental illness in their lifespan

1 in 20 U.S. adults experience serious mental illness each year

1 in 6 U.S. youth aged 6-17 experience a mental health disorder each year

50% of all lifetime mental illness begins by age 14, and 75% by age 24

Suicide is the 2nd leading cause of death among people aged 10-14

People with serious mental illness die up to 20 years younger because of preventable physical disorders

A median of 11 years lapses between first mental health symptom and first treatment

National Institute of Mental Health, World Health Organization

&

NAMI.org

Jesus, looking at him, loved him. Mark 10:21

Best Practices:

1. Calmly approach a distressed person, ensuring you and they are in a safe, relatively private quiet space.
2. Ask open-ended questions. Actively listen to the response non-judgmentally.
3. Think of mental illness as a medical condition like cancer or diabetes. Prayer is very important but does not replace good medical care and therapy. Honor the person and respect as a complete human being, even with illness or disability.
4. Respect the experience of a person in distress as very real to them. Avoid platitudes like “cheer up,” “make yourself happy,” “you’ll be fine,” “just stay busy,” and “stay positive.”
5. Encourage medical and professional intervention when appropriate. Give options and empower the individual and family to find the best treatment and intervention for their time and place.
6. Be patient and allow plenty of time for the person to process information. You may need to repeat yourself.
7. Do not confront, criticize, blame, use sarcasm or patronizing statements, or try to argue someone out of what they are experiencing. Do not laugh or dismiss the person.
8. Look for ways a person typically seeks and finds help, such as taking deep, calming breaths, calling a friend, or going for a run – or non-traditional actions like fidgeting, rocking, listening to podcasts, watching cartoons, or coloring.
9. Follow up with someone you have been with during a time of mental distress. Let the person know it is okay to talk about what they experienced and how they are now – and it is okay to talk about anything else.

*For I am convinced that neither death, nor life, nor angels, nor rulers, nor things present, nor things to come, nor powers, nor height, nor depth, nor anything else in all creation, will be able to separate us from the love of God in Christ Jesus our Lord.
Romans 8:38-39*

Mental health is significantly shaped by social factors:

Economic Stability,
Education Access & Quality,
Health Care Access & Quality,
Neighborhood & Environments,
Social & Community contexts which include race, culture, gender, age, disability, and sexuality.

Please keep these factors in mind. Each factor carries its own stigmas and non-addressing mental health. Care and intervention should be aligned with cultural sensitivities.

Mental Health Resources

In the case of an emergency, dial 911.

Organizations

Mental Health First Aid (MHFA)

Teaches how to identify, understand, and respond to signs of mental illnesses and substance use. The training teaches the skills needed to reach out and provide initial help and support to someone who may be developing a mental health or substance use problem or experiencing a crisis. The Episcopal Church has trained MHFA Instructors available to provide MHFA training. Contact Tammy Pallot at tammypallot@gmail.com to find an instructor near you.

National Alliance on Mental Illness (NAMI)

Provides resources, support groups, education, and training. (nami.org)

Substance Abuse and Mental Health Services Administration (SAMHSA)

Agency within the U.S. Department of Health and Human Services that leads public health efforts to advance the behavioral health of the nation. (samhsa.gov)

Mental Health America

National nonprofit dedicated to the promotion of mental health, well-being, and illness prevention (mhanational.org)

National Institute of Mental Health

The National Institute of Mental Health (NIMH) is the lead federal agency for research on mental disorders. NIMH is one of the 27 Institutes and Centers that make up the National Institutes of Health (NIH), the largest biomedical research agency in the world. (nimh.nih.gov)

Crisis Lines

988 Suicide and Crisis Lifeline

Provides 24/7, free, and confidential support for people in distress, prevention and crisis resources for you or your loved ones, and best practices for professionals in the United States. Available in 240 languages. Call or text 9-8-8; chat online at 988lifeline.org/chat.

Veteran's Crisis Line

Dial 9-8-8 and press 1 at the prompt to be connected to the Veterans Crisis Line. Available in 240 languages. Call 9-8-8 then 1; text 838255, or chat online at www.veteranscrisisline.net/get-help-now/chat.

LGBTQI + Crisis Line

Dial 9-8-8 and press 3 at the prompt to be connected to a counselor specifically trained in supporting LGBTQI+ callers. Available in 240 languages. Call or text 9-8-8, or chat online at 988lifeline.org/chat.

Disaster Distress Helpline

Call or text 1-800-985-5990. Provides immediate crisis counseling for people who are experiencing emotional distress related to any natural or human-caused disaster. The helpline is free, multilingual, confidential, and available 24 hours a day, 7 days a week.

Domestic Violence Hotline

24 hours a day, seven days a week, 365 days a year, the National Domestic Violence Hotline provides essential tools and support to help survivors of domestic violence so they can live their lives free of abuse.

Support Groups

	Meeting Information	Local Meeting Location	Local Meeting Dates/Times
Adult Children of Alcoholics & Dysfunctional Families	adultchildren.org		
Al-Anon and Alateen	al-anon.org		
Alcoholics Anonymous	aa.org		
Co-Dependents Anonymous	coda.org		
Dual Recovery Anonymous	draonline.org		
Gamblers Anonymous	gamblersanonymous.org		
Narcotics Anonymous	na.org		
Overeaters Anonymous	oa.org		
Sex Addicts Anonymous	sexaa.org		
Survivors of Incest Anonymous	siawso.org		
NAMI Family and Peer	Nami.org		

Local Medical Providers

	Name	Address	Telephone
Primary Care Physician			
Therapist/Counselor			
Psychiatrist			
Psychologist			

Local Mental Health Facilities

Name	Address	Telephone
Crisis and Stabilization		
Domestic		

Law Enforcement

911 – Emergency Response, notify the operator you are calling about mental health crisis

Mental Health Law Enforcement – Local law enforcement agencies may have a specially trained response team to respond to mental health crises. For information, call your local police department's nonemergency number.

Contact/Department Name	Telephone

Church Support

	Name	Email	Telephone
Priest			
Deacon			
Pastoral Care Leader			

Family Members/Friends/Emergency Contacts

Please respect the wishes of the individual and family in maintaining the confidentiality of protected health information.

Name	Relation	Email	Telephone

Mental Health Ministry with Individuals in Crisis

What is a mental health crisis?

A mental health crisis refers to a state of acute distress or an emergency situation related to an individual's mental health. Behaviors that are unusual and potentially harmful for the individual or others signal a mental health crisis. People in mental health crises may appear overly emotional or emotionally flat. They may appear mentally altered, unable to communicate clearly or understand what is going on around them. Experiencing someone in a mental health crisis can be frightening for anyone, but it is important to stay calm, clear, and kind. A mental health crisis can happen in any place at any time. A few suggestions follow on how to respond when such events occur, including a spiritual reflection and resources of faith.

A Parable

There is a well-known young adult member of your ministry setting who shows up to church on Sunday morning who suddenly seems to be unaware of what is going on around them, is dressed inappropriately, displays poor hygiene, and appears to have disorganized conversations and thoughts.

Best Practices when a person having a mental health crisis comes to church:

Individual	Congregation/Clergy
<p>Ensure the safety of all from risk of suicide or violence.</p> <p>Approach the person with a calm voice and express support and concern.</p> <p>If overdose is suspected and the person is unresponsive, call 911, turn the person on their side and administer Narcan.</p> <p>Have conversation in a private area.</p> <p>Ask how you can help.</p> <p>Be direct with questions about drug or alcohol use.</p> <p>Be patient and give them space and time to respond.</p> <p>Acknowledge the alarm someone is experiencing – and avoid expressing shock or embarrassment at hallucinations or delusions.</p> <p>Provide options and choices for next steps for help – do not give advice or make decisions for the person.</p> <p>Avoid touching the person unless you ask for permission.</p> <p>Be truthful and honest with the person in crisis about your actions.</p> <p>Do not make demands or threaten treatment or hospitalization</p>	<p>Be prepared to call emergency response (911) for injury, medical emergency, or general safety if needed – note in the call that it is a mental health crisis.</p> <p>Remain calm and provide personal space – do not crowd around the person, do not stare.</p> <p>Be prepared to provide water, food, or other needed comfort, as appropriate – or assist with contacting the person's social supports.</p> <p>If possible, move person to a quieter area or ask others to move to a different space.</p> <p>Continue connecting to a person recovering from a mental health crisis. Do not isolate or ignore the person.</p> <p>Have Crisis information readily available (easy access form provided in these files)</p> <p>Encourage people to use terms such as "person in a mental health crisis" or "someone is currently struggling with their mental health" and avoid stigmatizing language such as "crazy" or "insane."</p> <p>Have Narcan accessible in the church in the event of an overdose</p>

Spiritual resources for people experiencing a mental health crisis

A Canticle or Psalm:

<i>Lamentations 1:12,16; 3:19,22-24,26</i>	<i>Psalm 69:1-3,13-17</i>
Is it nothing to you, all you who pass by? * Look and see if there is any sorrow like my sorrow, Which was brought upon me, * inflicted by God's fierce anger. For these things I weep; my eyes flow with tears, * for a comforter is far from me, one to revive my courage. Remember my affliction and my bitterness, * wormwood and gall! The steadfast love of God never ceases, * God's mercies never end. They are new every morning; * great is your faithfulness. "God is my portion," says my soul, * "therefore will I hope in God." It is good that we should wait quietly * for the coming of God's salvation.	1 Save me, O God, * for the waters have risen up to my neck. 2 I am sinking in deep mire, * and there is no firm ground for my feet. 3 I have come into deep waters, * and the torrent washes over me. 13 Those who sit at the gate murmur against me, * and the drunkards make songs about me. 14 But as for me, this is my prayer to you, * at the time you have set, O Lord: 15 "In your great mercy, O God, * answer me with your unfailing help. 16 Save me from the mire; do not let me sink; * let me be rescued from those who hate me and out of the deep waters. 17 Let not the torrent of waters wash over me, neither let the deep swallow me up; * do not let the Pit shut its mouth upon me.

A reading:

The Lord waits to be gracious to you; therefore he will rise up to show mercy to you. For the Lord is a God of justice; blessed are all those who wait for him. – Isaiah 30:18

A breath prayer:

Lord, help me. Lord, have mercy. Lord, guide me through this.
(Repeat each phrase with the person)

A Collect:

Lord Christ, you came into the world as one of us, and suffered as we do. As we go through the trials of life, help us to realize that you are with us at all times and in all things; that we have no secrets from you; and that your loving grace enfolds us for eternity. In the security of your embrace we pray. Amen.

Mental Health Ministry with Individuals with Persistent Mental Illness (PMI)

In the general population, there are many people whose mental health symptoms create lifelong challenges. Persistent mental health conditions such as major depression, bipolar disorder, post-traumatic stress disorder, anxiety disorders, substance misuse, and schizophrenia – as well as other diagnoses – present unique challenges in the congregational setting. Symptoms can fluctuate over time, and every person has a different set of symptoms. Illness and healing may not be linear.

It is important to continue contact with individuals experiencing ongoing, mental health symptoms, approaching them with compassion and patience. Long-term and recurring mental illness can be deeply frustrating, so it is important to remind individuals that management of symptoms and improvement in quality of life is possible. A few suggestions follow on how to engage helpfully with people with PMI, including a spiritual reflection and resources of faith.

A Parable

An active member has stopped coming to services regularly and often states reasons they cannot attend meetings or groups of which they are a part. They are difficult to connect with and are dropping other activities outside of church. When they are at church, they appear distracted, withdrawn, and irritable. This seems like the beginning of a cycle that the church has seen repeated in the past.

Best Practices for the care of individuals with PMI

Reach out to individuals who are struggling with their mental health or going through a “rough spot”, offering support and compassion while listening rather than attempting “to fix.”

Ask how someone is feeling, and if things are better or worse than yesterday and other days. Consider asking a direct question like, “Do you feel like you are functioning?”

Understand that individuals with PMI may think and act differently at times, but they also have unique perspectives and gifts to offer the church.

Watch for signs of (and consider asking about) risk for suicide or self-harm.

Encourage individuals to seek support from mental health professionals in their community and to follow recommended treatment.

Encourage individuals to connect with family, friends, or other people and groups for social support.

Seek ways to support families of individuals with PMI, perhaps providing meals, ride assistance, prayer shawls, or household help during a mental health emergency.

Encourage individuals to use resources they typically use to help support their mental wellness, including examining ways to help reduce stress like sports, listening to music, yoga, meditation, walking, cooking, or crafting.

Provide spiritual support and guidance by offering prayer, scripture reading, or the Litany of Healing to individuals and families to help augment professional mental health services.

Engage with educational opportunities and generate discussions around mental health in our congregations to help destigmatize mental health care to make it more accessible to all populations.

Spiritual resources for use for and with Individuals with Persistent Mental illness

A Psalm:

Psalm 46

- | | |
|---|---|
| 1 God is our refuge and strength, *
a very present help in trouble. | 7 The nations make much ado, and the
kingdoms are shaken; *
God has spoken, and the earth shall melt away. |
| 2 Therefore we will not fear, though the earth
be moved, *
and though the mountains be toppled into the
depths of the sea; | 8 The LORD of hosts is with us; *
the God of Jacob is our stronghold. |
| 3 Though its waters rage and foam, *
and though the mountains tremble at its tumult. | 9 Come now and look upon the works of the
LORD, *
what awesome things he has done on earth. |
| 4 The LORD of hosts is with us; *
the God of Jacob is our stronghold. | 10 It is he who makes war to cease in all the
world; *
he breaks the bow, and shatters the spear, and
burns the shields with fire. |
| 5 There is a river whose streams make glad the
city of God, *
the holy habitation of the Most High. | 11 "Be still, then, and know that I am God; *
I will be exalted among the nations; I will be
exalted in the earth." |
| 6 God is in the midst of her; she shall not be
overthrown; *
God shall help her at the break of day. | 12 The LORD of hosts is with us; *
the God of Jacob is our stronghold. |

A reading:

Come to me, all who labor and are heavy-laden, and I will give you rest. Take my yoke upon you, and learn from me; for I am gentle and lowly in heart, and you will find rest for your souls. For my yoke is easy, and my burden is light. - Matthew 11:28-30

A breath prayer:

My soul clings to you; your right hand holds me fast – *Psalm 63:8*
(repeat prayer)

A Collect:

This is another day, O Lord. I know not what it will bring forth, but make me ready, Lord, for whatever it may be. If I am to stand up, help me to stand bravely. If I am to sit still, help me to sit quietly. If I am to lie low, help me to do it patiently. And if I am to do nothing, let me do it gallantly. Make these words more than words, and give me the Spirit of Jesus. *Amen.*

Mental Health Ministry with Family and Caregivers of People with Mental Illness

It can be too easy to overlook caregivers and family members of people with mental illness in crisis situations and in the enduring life challenges of persistent mental illness. But responses of ignoring, avoiding the topic, or assuming that everything is okay unless someone says something only perpetuate cultural habits of stigmatizing mental illness as a taboo subject and isolating caregivers and family members. People who care for and live with individuals with mental illness often bear significant burdens and experience cycles of deep worry, isolation, and loss of hope.

Like anyone else, family members and caregivers are God's beloved and part of the human family. They have good and bad days, wear old clothes or new clothes to church, and love or hate the coffee at coffee hour on Sundays. Christ calls us to care for, encourage, and support one another, including people working most directly and intimately with those with mental illness. What does it mean to provide Pastoral Care to a Family/Caregiver dealing with mental illness? A few suggestions follow on how to engage helpfully with family and caregivers, including a spiritual reflection and resources of faith.

A Parable

A family seems to be showing up on Sundays with a great weight on their shoulder. They are not sharing their stress with the faith community during coffee hour. One of their children, a teen in the youth group, has stopped regularly attending church. Finally, during Bible study, one of the parents mentioned that their teen, who had been bullied in school and online, recently attempted suicide and is currently under care for help dealing with depression and anxiety. As people listened compassionately, the parents shared that they feel overburdened, isolated, overwhelmed, and intensely worried about their child's future.

Best Practices:

General Parish Guidance:

Express empathy and compassion; minimize your own reflections.
Respect the challenge of their situation.
Remember support is not control; allow and honor people's decisions.
Be clear and honest; don't patronize, and don't stigmatize.

Providing Holistic Family Support:

Regularly check in with the family or caregiver to keep connected and best understand their needs.
Utilize compassionate listening; meet the family where they are in that moment.
Connect family members with the appropriate support group (age, demographic)
Offer meal support, ride assistance, prayer shawls, household help, or whatever may be needed.
Be prepared for ups and downs, highs and lows over time.
Encourage counseling as needed or desired, social connections, and activities that bring joy or relief.

Providing Support to Adult Family Member(s):

Help them reflect on and name what they need for self-care.
Provide your time to allow for them to rest and get away from the stress of the situation.
Help them realize that they are not to blame. Mental illness is a medical issue outside their control.

Providing Support to Sibling(s):

Help siblings maintain their normal routine or activities.
Provide time for kids to be kids.
Offer opportunities for kids to do something fun, engaging, and different, away from the home

Spiritual resources for use for and with Family and Caregivers

A Hymn or Psalm

Hymn 470 (alternate 469)		Psalm 139: 1, 2, 6-9
<p>There's a wideness in God's mercy, Like the wide-ness of the sea; There's a kindness in His justice, Which is more than liberty.</p>	<p>There is plentiful redemption In the blood that has been shed; There is joy for all the members In the sorrows of the Head.</p>	<p>¹LORD, you have searched me out and known me; * you know my sitting down and my rising up; you discern my thoughts from afar.</p>
<p>There is wel-come for the sinner, And more graces for the good; There is mercy with the Sav-ior; There is healing in His blood.</p>	<p>For the love of God is broad-er Than the measure of our mind; And the heart of the Eternal Is most wonderfully kind.</p>	<p>²You trace my journeys and my resting- places * and are acquainted with all my ways.</p>
<p>There is no place where earth's sorrows Are more felt than up in Heaven; There is no place where earth's failings Have such kindly judgment given.</p>	<p>If our love were but more faithful, We should take Him at His word; And our lives would be thanksgiving In the goodness of our Lord</p>	<p>⁶Where can I go then from your Spirit? * where can I flee from your presence?</p> <p>⁷If I climb up to heaven, you are there; * if I make the grave my bed, you are there also.</p> <p>⁸If I take the wings of the morning * and dwell in the uttermost parts of the sea,</p> <p>⁹Even there your hand will lead me * and your right hand hold me fast.</p>

A reading: Glory to God whose power, working in us, can do infinitely more than we can ask or imagine: Glory to him from generation to generation in the Church, and in Christ Jesus for ever and ever. Amen. - Ephesians 3:20,21 or

For I am convinced that neither death, nor life, nor angels, nor rulers, nor things present, nor things to come, nor powers, nor height, nor depth, nor anything else in all creation will be able to separate us from the love of God in Christ Jesus our Lord. - Romans 8:38-39

A breath prayer or call and response:

<i>/ pray for Strength;</i>	<i>God, I am sustained by your eternal love and presence</i>
<i>/ pray for Peace;</i>	<i>God, I am sustained by your eternal love and presence</i>
<i>/ pray for Courage;</i>	<i>God, I am sustained by your eternal love and presence</i>
<i>/ pray for Community;</i>	<i>Jesus, I am sustained through remembrance of your suffering</i>
<i>/ pray for Rest;</i>	<i>Jesus, I am sustained through remembrance of your suffering</i>
<i>/ pray for Endurance;</i>	<i>Jesus, I am sustained through remembrance of your suffering</i>
<i>/ pray for Compassion;</i>	<i>Holy Spirit, I am sustained by your prayer and comfort</i>
<i>/ pray for Joy;</i>	<i>Holy Spirit, I am sustained by your prayer and comfort</i>
<i>/ pray for Wisdom;</i>	<i>Holy Spirit, I am sustained by your prayer and comfort</i>
<i>My soul clings to you;</i>	<i>your right hand holds me fast</i>

A Collect:

O God, surround N. with your compassion as [they] live with N. in sickness. Help N. to accept the limits of what [they] can do, that feelings of helplessness and frustration [and anger] may be transformed into serene acceptance and joyful hope in you. Let [them] remember the grief and love of Jesus over the afflictions of his friends, knowing that God too weeps. Bring [them] gladness and strengthened love in [their] service; through Christ our companion. Amen.

Mental Health Ministry with Faith Communities Surrounding a Mental Health Crisis

Episodes of severe mental illness can happen at any time and any place. When these incidents occur in church, they can rattle people in our ministry settings. How are we called to respond?

While the disciples often initially responded to disability or disruptive behavior in unhelpful ways, Jesus was consistent in approaching or inviting the person in distress. It is a matter of how we approach situations, respecting the dignity of all people.

During and immediately after such events, we seek ways to help each other remain calm, focused, and appropriately responsive. Our first concern is for everyone's safety, quickly followed with intentional care for the person in distress. If emergency response is not necessary, we seek to help a person return to a level of calm, respectful of their space. Once the event has passed and the person has received appropriate care, members of the faith community need space to discuss and understand what happened, acknowledging anxiety but responding in faith. We want these events to be teaching moments to show God's Love in this world.

A Parable

On a regular Sunday, you are sitting in your regular pew listening to a regular sermon when an unfamiliar gentleman stands up and says, "I see King David flying on a star!!!"

The preacher stops the sermon momentarily while an usher goes over to the gentleman to do a wellness check of the individual. It is determined that the individual would like the usher to sit with them through the end of the service. After the service, the priest quietly talks with the gentleman while the congregation goes to coffee hour. People talked a bit about the experience during coffee hour.

The next Sunday, some are worried about going back to church for fear of the gentleman returning.

Best Practices: Teach, Practice, Model

During the Event:	During Fellowship after the Event:
<p>Quickly assess if the person's mental health crisis poses danger to the person or other people (call 911 immediately if necessary)</p> <p>A couple of people, not everyone, engage the person using your De-Escalation Steps (remain calm, approach gently, speak calmly and directly with the person, listen without judgment, redirect)</p> <p>Others, resume activity and give space to those engaging the person; do not make the center of attention.</p> <p>Assess for immediate needs and appropriate response including emergency care, medical help, or family assistance</p>	<p>Have community leaders available to discuss feelings about the event.</p> <p>Do not act like the event did not happen.</p> <p>"Comfort each other" (1 Thessalonians 5:11), acknowledging your feelings but not gossiping about the person.</p> <p>Provide resources to help families debrief from the event during the week.</p>
Next Few Weeks:	Long-Term Response:
<p>Create an action plan if the individual returns, such as designating a pew partner or contacting the caregiver.</p> <p>Send a message to the congregation of general welcome, reminding the parish of the welcoming and inviting love of Jesus for all. Acknowledge fear and engage discussion.</p> <p>Create space for small group discussions around mental illness and the church's response.</p> <p>Youth and children's groups should have designated time to discuss the event in their language.</p>	<p>Train clergy and members in Mental Health First Aid</p> <p>Join or create a local affiliate of the National Alliance on Mental Illness</p> <p>Review your faith community's safety protocol; discuss mental health response regularly along with other crisis planning</p> <p>Become aware of local mental health crisis response resources with local EMTs/Police</p> <p>If needed, clarify and review boundaries with the individual who experienced a mental health crisis</p> <p>Find times during the year to include mental illness in sermons.</p>

Spiritual resources for Faith Communities Surrounding a Mental Health Crisis

A Canticle:

Jonah 2:2-7,9

I called to you, O God, out of my distress, and you
answered me; *
**out of the belly of Sheol I cried, and you
heard my voice.**

You cast me into the deep, into the heart of the
seas, *
**and the flood surrounded me; all your waves
and billows passed over me.**

Then I said, "I am driven away from your sight; *
**how shall I ever look again upon your holy
temple?"**

The waters closed in over me, the deep was round
about me; *

**weeds were wrapped around my head at the
roots of the mountains.**

I went down to the land beneath the earth, *
**yet you brought up my life from the depths, O
God.**

As my life was ebbing away, I remembered you, O
God, *
**and my prayer came to you, into your holy
temple.**

With the voice of thanksgiving, I will sacrifice to
you; *
**what I have vowed I will pay, for deliverance
belongs to the Lord!**

A reading:

For this reason I remind you to rekindle the gift of God that is within you through the laying on of my hands, for God did not give us a spirit of cowardice but rather a spirit of power and of love and of self-discipline. - 2 Timothy 1:6-7

A breath prayer or call and response:

Give us Strength to move out of fear into love;
Give us Peace to move out of fear into love;
Give us Courage to move out of fear into love;
Give us Community to move out of fear into love;
Give us Respite to move out of fear into love;
Give us Endurance to move out of fear into love;
Give us Compassion to move out of fear into love;
Give us Joy to move out of fear into love;
Give us Wisdom to move out of fear into love;

*Creator, Sustain us
Creator, Sustain us
Creator, Sustain us
Son, Sustain us
Son, Sustain us
Son, Sustain us
Spirit, Sustain us
Spirit, Sustain us
Spirit, Sustain us*

Closing Hymn Lift Every Voice #72 Just a Closer Walk with Thee

I am weak but thou art strong;
Jesus, keep me from all wrong;
I'll be satisfied as long
As I walk, let me walk close to thee.

Refrain:
Just a closer walk with thee,
Grant it, Jesus, is my plea,
Daily walking close to thee,
Let it be, dear Lord, let it be.

²Through this world of toil and snares,
If I falter, Lord, who cares?
Who with me my burden shares?
None but thee, dear Lord, none but thee.
[Refrain]

³When my feeble life is o'er,
Time for me will be no more;
Guide me gently, safely o'er
To Thy kingdom shore,
to thy shore. *(refrain)*

Outline for Curriculum to Educate and Train Episcopal Clergy in Ministry Related to Mental Health and Mental Illness

Task Force for Ministry with Individuals with Mental Illness

November 2023

Curriculum Modules and Core Content

“Truly I tell you, just as you did it to one of the least of these who are members of my family, you did it to me.” (Matthew 25:40)

This document outlines the recommended content areas, learning aims, and capacity development goals for clergy and spiritual leaders in the Episcopal Church. In keeping with the charge given to the church in GC 2022’s affirmed Resolution A109, “Developing Curriculum and Required Training for Clergy in Mental Health Pastoral Care,” this curriculum outline significantly moves forward the call for “the creation and launch of new curriculum to train all Episcopal ordained clergy, candidates, and postulants in mental health and mental illness awareness that emphasizes pastoral care, the forming of caring relationships, and effective advocacy.” There are ten core components in this curriculum. Each is explained and plotted in this document. Building upon foundations laid in Mental Health First Aid (MHFA) training, the curriculum expands and more deeply extends knowledge and training for clergy in mental health ministry with individuals, their families and caregivers, faith communities, and wider surrounding communities. The components, intended to be delivered in modular form for in-person, hybrid, and online completion, are as follows:

- Mental Health First Aid (MHFA) one-day training certification (foundational)
- Helpful and unhelpful theological/biblical frames and spiritual practices
- Individual pastoral and spiritual care, and discernment of concerns
- Family and caregiver pastoral and spiritual care, and discernment of concerns
- Community inclusion for individuals with mental illness and their families
- Care for community in balance with individuals’ mental health/illness
- Self-recognition, self-review, self-restoration, self-resilience, self-strength
- Response to trauma in the wider community
- Establishing resource connections in one’s community
- Alliance and advocacy

In total, the curriculum spans four to five days of learning and practice. Clergy and spiritual leaders completing the curriculum return with specific tools and practices, clear theological foundations, and charted goals and resource contact lists to guide development of faith communities' welcome, inclusion, accompaniment, support, encouragement, empowerment, and advocacy for people facing mental health challenges and their families.

Completion of instructional modules and learning tools, and Spanish translation and cultural adaptation, will be addressed early in the next triennium.

I. Mental Health First Aid (MHFA) training certification

The day-long basic training in Mental Health First Aid (MHFA) is the beginning foundation for clergy training in mental health and mental illness. MHFA is an early intervention education program that teaches individuals to recognize signs and symptoms of a potential mental health challenge, listen non-judgmentally, give reassurance, and refer a person to appropriate professional support and services. The MHFA instructor-led training consists of 10 learning segments. The in-person course may be taught in a single 7.5-hour session or broken into two sessions and delivered over two days. The blended MHFA consists of a 2-hour self-paced, 5.5 hours in-person or 6.5 hours virtual instructor-led training. Learners are taught an action plan that they apply for non-crisis and crisis situations. The skills obtained in MHFA are similar in scope to those obtained in Red Cross first-aid and CPR. The MHFA manual provides a more than sufficient foundation for clergy in evidence-based education about mental illness in general, and more specifically about anxiety, depression, substance misuse, psychoses and thought disorders, and eating disorders – and the best healthy ways to engage with people experiencing such distress.

Faith communities are often one of the first points of contact for people experiencing a mental health challenge. By obtaining the MHFA certification, clergy and congregation members can develop the knowledge and skills necessary to identify and provide initial support to those facing mental health challenges or struggling with their emotional well-being. They can effectively assess, respond to, and de-escalate critical situations, offering compassionate guidance and referrals to appropriate mental health professionals and other available support systems.

This certification empowers clergy members to create a safe, inclusive, and supportive environment where individuals can seek help without fear of stigma or judgment. These societal barriers can delay individuals from seeking the appropriate professional support they need. This empathetic approach helps break down the fear of being stigmatized or misunderstood, encouraging individuals to seek the necessary help and guidance.

MHFA one-day trainings are being offered by trained Episcopal MHFA instructors, who are available to offer the trainings at seminaries and diocesan schools, clergy conferences, and varied gatherings of clergy and lay-leaders in different settings.

II. Helpful and unhelpful theological / biblical frames and spiritual practices

Scripture, prayer, spiritual practices, and the theological beliefs and promises of Christian faith can be invaluable resources to people experiencing mental health challenges and crises, as well as for those who support them. These frameworks have and continue to provide important help – and they have been and continue to be used in some instances to do damage. They can help bring relief, comfort, and guidance for those wrestling with mental health challenges – and they can add fuel to the fire of problems in mental health.

Mental health is a part of God's gift to us in our creation, just like our physical health. This health is in a range of experience and expression, with bodies and minds widely diverse in capabilities and limits. The creation stories in Genesis paint a picture of a world in harmony and of humanity created to be complete with one another and not in isolation. But these stories give us no detailed descriptions of bodies or personalities. It is easy to impose on these stories of creation a vision of perfection. But these "perfect" images are our own creations and projections, arising from our sense of discrepancy between what we are and what we imagine is the ideal.

Nonetheless, creation's harmony was broken by sin. Perhaps the primal sin is the striving for perfection, for an ideal beyond our finite and individually distinct and quirky natures? Or was the primal sin instead the impulse to hide and deny what we are, and to descend into cover-up? Regardless, Christian theology consistently notes that sin is endemic to human life and is embedded in our relational and social patterns and structures as well as our thought patterns.

This recognition of sin can be over-conflated with the ways we face and contend with human suffering, fragility, and illness. Over the centuries, and preceding Christ, and in religions around the world, human wrongfulness (sin) has been tied closely to experiences of pain, disability, injury, and disease. Mental illness has been no stranger to this pattern, nor has addictive misuse of substances. There has been a pattern like we find in Jesus' disciples as they consider the man born blind: "Rabbi, who sinned, this man or his parents, that he was born blind?" (John 9:2). Jesus states clearly that neither is the case.

Mental illness, like physical illness, is not God's punishment, God's challenge for personal growth, or God's special attention to an individual.

There is much social damage and internal injury that people with mental illness and other mental health challenges have experienced in the Church, stemming from the perceived connection between sin and illness of all types. This connection has some root in scripture, e.g. Psalm 39:1, Genesis 3, or 1 Cor. 11. But there are ways that this connection has led to stigmatization of individuals, families, whole communities, and entire nations and races, thus contributing to the problems of internalized oppression and unaddressed intergenerational trauma. As followers of Jesus, we believe that there is sin and evil in the world, and that active rejection or distortion of God's will in the world in thought, word, and deed is real and has real consequences. There is

wide breadth of expression in human life available to us in the holiness of creation in its rich diversity—and there are boundaries.

At the same time, we remain rooted in a much fuller understanding of the nature of God, humanity, sin, and the ultimate goodness of creation. We continue to learn and see ways that some theological assumptions through the centuries have stigmatized and diminished different races, cultures, and classes of people as well as different layers of human experience, creating false associations with sin where there are none. Our most honest and rigorous theology in faithfulness to Christ Jesus will intently question and strive to correct any forms of stigma, minimization, or marginalization applied to human groups or types of human illness. Following the pattern of Christ Jesus the Healer, the One who is “God with us,” we seek to meet all people where they are, de-stigmatize all forms of illness—and particularly mental illness—decouple the experience of illness from sin, and radically include all people within the Church as full and complete members and beloved children of God, as promised in baptism.

In our baptismal covenant, we promise to respect the dignity and worth of every human being. We must recognize that mental health is an integral part of the flourishing of each individual. The Episcopal Church acknowledges the importance of both spiritual and medical approaches in addressing mental health challenges. This means that individuals are encouraged to seek appropriate medical and therapeutic interventions alongside spiritual support and pastoral care.

The Church has long emphasized the principles of compassion, acceptance, and inclusion. In the area of mental health, this includes creating a supportive environment where individuals experiencing mental health challenges are welcomed into fellowship without judgment or stigma. Clergy and laity in faith communities together can provide support, care, and encouragement for those struggling with mental health challenges, encouraging and facilitating help in the forms of medical, therapeutic, social, and relational resources, and advocating for assistance and fair treatment when needed.

The Church encourages spiritual practices within our tradition, such as prayer, meditation, and participating in the sacraments, as aids to mental, emotional, physical, relational, and spiritual well-being for all people. These are rarely sufficient in themselves to bring “cure”; more aid and support are needed from medical and mental health professionals, social services, and wider communities of care.

Inclusion brings with it a readiness to be with people experiencing mental health challenges and mental distress. But inclusion and care of individuals coincides with care for the faith community as a whole. Matters of safety and health for the community set important boundaries on our behaviors, actions, and spoken words. Clarity in a faith community about such outer boundaries can help facilitate safety in which there is freedom for a full range of human expression. There are examples in Christian history of overly restrictive bounds in some communities of faith, and

other examples of overly (and perhaps naively) open communities of faith with no clearly stated bounds.

Achieving these aims will require the examination of our internal biases, both individually and systemically, in the area of illness and health, and particularly mental health and mental illness, much as we continue to confront racial, socioeconomic, and LGBTQI2S+ biases. The deconstruction of these biases requires us to unlearn what may have been long habits (such as use of phrases like “Isn’t that crazy?”) and to learn and practice new patterns (such as adjusting language to say, “Isn’t that surprising?”).

This curriculum aiming to achieve such reorientation delves into several areas.

Episcopal priests, deacons, and bishops will read, examine, discuss, and internalize theological frameworks that guide their pastoral encounters with people facing the challenges of anxiety, depression, substance misuse, psychosis, and internalized messages of self-harm. They will learn to distinguish helpful resources and perspectives from unhelpful ones, to inform engagement with different mental health challenges.

Framing the entire curriculum, and woven throughout all segments of the curriculum, this fundamental perspective is consistently emphasized and re-emphasized:

God loves us with an eternal love that is as impartial as it is everlasting. God is always present, nearer to ourselves than our next breath. As God is present to us, God relies on us to be present with one another. It is not God's will that people get sick physically or mentally. Mental illness is not an indictment of one's faith or inherent goodness. Mental illness is not some form of divine punishment. God is with us and knows our suffering and wrestling. We are not alone.

This perspective is not just demonstrated in words, prayer, or liturgy. This perspective is demonstrated through our actions with those in the headwinds of mental illness and mental health challenges. In the Beatitudes (Matthew 5) and in his great declaration in the synagogue as he read from Isaiah (Luke 4), Jesus embraces and calls us to embrace God’s call to be with all experiencing any disability, oppression, or loss, to bring good news and point to paths of full life. As God is present, we are to be present. As God is merciful, we are to be merciful. The love of God is demonstrated through our presence – and how we are present – with people in need and distress.

A crucial part of learning mental health ministry is how to match spiritual resources and practices appropriately to different mental health challenges and mental illness situations in ways that strengthen health and redirect focus – and how to avoid inappropriate or mismatched spiritual practices and theological resources that end up contributing to symptoms or negative responses. As a guide, these research-based insights on the positive and negative impacts of spirituality on mental health (as summarized on WebMD) provide a starting framework for evaluating the match of spiritual practice to mental health challenges

[\(<https://www.webmd.com/balance/how-spirituality-affects-mental-health>\):](https://www.webmd.com/balance/how-spirituality-affects-mental-health)

Positive impacts of spirituality--

- A higher sense of peace, purpose, meaning, and hope.
- Improved confidence, self-esteem, and self-control.
- Making better sense of one's life experiences.
- When unwell, spirituality can help to find and feel inner strength, resulting in faster recovery.
- For a spiritual community: stronger support for the person, stronger confidence for the community.
- Efforts to improve and strengthen relationships with self and others.

Negative impacts of spirituality--

- Possibility of being taken advantage of, when emotionally vulnerable.
- When emotionally vulnerable, they are susceptible to being nudged into unhealthy activities.
- Potential to mix religious stories and teachings with delusional ideas about power or punishment.
- Potential to drift toward, or be lured toward magical thinking.

III. Key resources for this work include the following:

The Bible and Mental Health: Towards a Biblical Theology of Mental Health, edited by Christopher C H Cook and Isabelle Hamley, forward by Justin Welby, 2020 – a rich collection of helpful essays presented in a conference at Lambeth Palace in 2019.

Grace for the Afflicted: A Clinical and Biblical Perspective on Mental Illness, by Matthew S. Stanford, 2017 -- a careful biblical and scientific examination of mental health and mental illness by a scholar in the Evangelical world of Christian faith, as a corrective path for people who have been taught and have internalized theological perspectives that are negative and harmful.

Black Mental Health Matters: The Ultimate Guide for Mental Health Awareness in the Black Community, by Aaren Snyder, 2020

Theology vs Psychology: Understanding Mental Illness and Coping with its Presence in the Black American Church, by Frederick D. D. Woods and Jerrod Smith, 2020.

The Joy of the Disinherited: Essays on Trauma, Oppression, and Black Mental Health, by Kevin Dedner, narrated by Jeff "Giovanni" Flanigan, 2022 audio book.

Toward a Theology of Psychological Disorder, by Marcia Webb, forward by John Swinton, 2017.

Healing the Soul Wound: Trauma-Informed Counseling for Indigenous Communities, by Eduardo Duran, forward by Allen E. Ivey, narrated by Kaipo Schwab, 2019 audio book.

Mental Health Ministry Resources, by Carole J. Wills, 2010. Annotated bibliography of books, articles, and videos for use with faith communities. This document is offered through the courtesy of the Congregational Resource Guide: www.congregationalresources.org.
https://inmi.us/wp-content/uploads/2017/04/congregational_resource_guide.pdf.

Spirituality and mental health, by Abraham Verghese, *Indian Journal of Psychiatry*, 2008 Oct-Dec; 50(4): 233–237. An Indian psychiatrist's perspectives on the need for continuing improvement in the field of psychiatry to address, make space for, honor, and treat as resource the religious and spiritual perspectives and practices of people with mental illness. The article provides worthwhile recommendations.
<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2755140/>.

Religious Practices and Spiritual Well-Being of Schizophrenia: Muslim Perspective, by K. Irawati et al., *Psychology Research and Behavior Management*, March 2023(16), 739-748. Available in Creative Commons through Dove Medical Press. An important perspective on the value of spiritual practice for Indonesian adult Muslims with schizophrenia who are otherwise usually barred in Islam from community spiritual practices. <https://www.dovepress.com/religious-practices-and-spiritual-well-being-of-schizophrenia-muslim-p-peer-reviewed-fulltext-article-PRBM>.

Dictionary of Pastoral Care and Counseling, edited by Rodney Hunter et al., Abingdon Press, 1990/2005 -- this compendium provides insights into the art of pastoral care, support, and counseling as it relates to differing communities, life stages, and conditions of life and health.

Clergy as a frontline mental health service: a UK survey of medical practitioners and clergy, by William Heseltine-Carp and Matthew Hoskins, in *General Psychiatry*, 33(6), 2020 – in this study of clergy and mental health professional referrals in Wales, there are insights about the need for increasing clergy awareness and recognition of mental health challenges, as well as increasing adeptness of pastoral care and partnership-building by clergy so that referrals from mental health professionals to clergy might increase:
<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7590374/>

IV. Individual pastoral and spiritual care, and discernment of concerns

Clergy encounter many people facing mental health challenges and wrestling with mental illness. Even in this age of increasing decline in religious affiliation, clergy remain an important first point of contact and counsel for people in distress. In the United States, 40% of people facing mental health challenges seek counsel, support, and direction from clergy, more than from psychologists

and psychiatrists.⁴ In many other countries, this pattern is even more pronounced. It is a relief to know that the vast majority of clergy (80%-90%) refer people to mental health professionals, and are particularly good at referring people in crisis or experiencing psychosis. In this way, clergy are functioning well as gateways into mental health care rather than as gatekeepers. However, clergy are less certain about referral process for people with non-crisis but persistent mental health challenges such as depression and anxiety.

Mental health challenges manifest in different levels of intensity, and, accordingly, call for different levels of response. Intensity level is determined by assessing the level of impact on a person's life and on the person's family, household, and surrounding community. Mental health challenges can vary in intensity, ranging from acute situations that demand immediate intervention to ongoing conditions that require ongoing support and management. Additionally, newly emerging mental health concerns or shorter situational crises may require a tailored response. Thus, one first quickly assesses whether a person is in danger of suicide, self-harm, or harm to others. Then, at a broad level of assessment, one attempts to discern whether a person is experiencing a crisis, an ongoing condition, a new emergence, or a short-term situational response.

Different levels of response include intervention, accompaniment, support, integration, and growth. Regardless of level of response, it is important to communicate deep respect for the person's dignity and to offer an ongoing sense of appropriate autonomy and choice in the next steps taken. Interventions are typically necessary when dealing with mental health crises of high intensity. This involves promptly addressing the situation through immediate and targeted responses to secure safety and rapid assistance. This may include crisis hotlines, emergency services that are informed about mental health, or hospitalization if necessary. The emphasis during this level of response is on stabilization and prevention of further harm.

In situations where mental health concerns are ongoing, accompaniment is a crucial and primary response to support individuals with persistent mental health conditions. Accompaniment (along with readiness for intervention) are at the heart of the approach taught in Mental Health First Aid, and it involves approaching and being present with someone, listening in a way that acknowledges the intensity of their experience, providing support and helpful information without giving advice, nudging toward their seeking of support and help from professionals and family or friends, and helping them navigate the complexities of their mental health journey. Sustained accompaniment may involve regular check-ins, assisting in connecting with therapists and medical professionals, spending time together, or helping to connect with other social networks of people.

Support is a level of response that is invaluable regardless of the intensity of mental health challenge. A supportive environment where individuals feel safe and valued can foster healing and growth. This may involve encouraging support networks of loved ones, peers, or support groups that offer understanding, empathy, and guidance. Clergy can help shape the culture of faith communities in ways that foster support, which includes openness and normalization of conversations about mental and physical health challenges, involvement of people in everyday

and special activities, and conversing about typical life activities and events. Support can also encompass ongoing encouragement for people to “stick with it” in therapy, medication management, and other forms of professional help.

Integration is crucial to help people facing mental health challenges to turn, or return, to their normal life activities and patterns that helps sustain and strengthen them. This involves encouraging and assisting people in finding ways to live fulfilling and meaningful lives alongside their mental health challenges. Integration may include identifying strengths, building resilience, rebuilding daily routines, and finding strategies to manage symptoms effectively. This will include establishing or reestablishing patterns healthy eating, exercise, and sleep; working, volunteering, or otherwise offering skills and talents; finding activities that are emotionally and relationally nurturing; and engaging in spiritual practices.

Finally, growth can be seen as a long-term goal for individuals facing mental health challenges. Encouraging personal growth involves empowering individuals to understand and embrace their experiences, identify areas of growth, and take steps toward further self-development. In the context of a faith community, this can be an important part of normalizing and de-stigmatizing the experience of mental illness, since continuing growth is an invitation for all people of faith and is engaged and encouraged together in community. Growth is also part of the ongoing work of therapy, and is likely to be part of individual conversations and consultations with clergy and individual lay leaders. People may find significant growth through learning, training, fresh skill development, a rule of life, or entering into ministries of support, care, and advocacy for others.

This curriculum provides clergy and key lay leaders with further understanding of signs and symptoms of various forms of mental illness, along with some guidelines for most helpful forms of interaction with each. The curriculum draws upon resources regarding helpful responses and healing pathways for people encountering psychosis, dealing with patterns of substance misuse, seeking recovery from trauma, in enduring emotional turmoil, for facing other mental health challenges. These guidelines will help clergy avoid unintentionally simplistic, stigmatizing, or unsettling language that may occur if overlooking the complexity of mental health challenges.

Recognizing the interconnectedness of mind, body, and spirit, Episcopal clergy and spiritual leaders navigate between appropriate emphasis on spiritual matters through pastoral care and spiritual guidance and appropriate reminders about the value of medical and scientific resources for help from mental health professionals . This balance ensures a holistic approach that addresses both the spiritual and practical aspects of mental health care.

Collaboration with mental health care professionals is encouraged—but is done only when securing a person’s consent for such conversation (or when threat of injury, harm, or suicide requires immediate attention regardless of choice). Obtaining a signed release prior to contacting a healthcare provider is strongly recommended. By working together, pastoral and spiritual care providers can support individuals in their journey towards mental wellness, ensuring a

comprehensive approach that acknowledges the importance of both faith and science in mental health care within the Episcopal Church.

“Spiritual First Aid” is a process akin to Mental Health First Aid that provides similar guidelines for ways of listening, accompanying, and responding to the types of challenges faced by someone in distress. This resource, developed by psychologist J.D. Aten as part of Wheaton College’s Humanitarian Disaster Institute (2020), can be helpful as a foundation for pastoral care teams and faith community members in general. Building on a cycle of basic steps of presence – Attend, Ask, Act, and Repeat – “Spiritual First Aid” emphasizes accessing the following tools we have at our disposal.

- Active Listening: Full presence and space for non-judgmental listening, reflecting what you hear.
- Empathy and Validation: Show respectful recognition of someone’s feelings and experiences. You do not need to (and should not) affirm the person’s account of events and realities as factual, but it is important to acknowledge the pain, struggles, and difficulties of the experience.
- Prayer and Meditation: If appropriate and welcomed, offer to pray or engage in a moment of quiet contemplation and centering together for connection with God, inner peace, and renewed faith.
- Referrals: When the person’s needs go beyond spiritual support or require professional help, encourage and offer appropriate referrals to mental health professionals, counselors, or other resources. If the situation is a crisis, you may need to make the calls, including emergency services.
- Scriptures and Sacred Texts: As appropriate, offer relevant scriptures or sacred texts that might gently suggest paths and open doors of recognition, comfort, inspiration, and guidance.
- Spiritual Counseling: This is not typically offered in a situation of crisis or worsening symptoms, and should only be used with caution with people experiencing delusions. After a person is calmer and re-centered, with the passage of some quiet time and space, it may be helpful to invite the person into a shared discussion of faith, purpose, and integration of spirituality with life.
- Encourage Community: Note the importance of community and involvement in gatherings with others (including the faith community). Encourage a person to connect with friends, family, or community members who will offer support, encouragement, and belonging.
- Self-Care: Remind the person of possible resources for self-care, asking what the person does to nurture health. Encourage individuals to engage in activities that nurture their mind, body, and soul, and to practice self-compassion during difficult times.

“Spiritual First Aid” uses the acronym BLESS to organize a framework for assessing and intervening, humbly helping, and providing practical presence. BLESS represents the first letter of each of the five core needs (Belonging, Livelihood, Emotional, Safety, and Spiritual needs) Spiritual First Aid addresses.

Belonging - Actively reach out to those isolated or disconnected, invite into community.

Livelihood - Check on employment and income that affect quality of life and meeting of needs.

Emotional - Cultivate a culture of support and openness so people can share emotions and seek aid.

Safety - Establish clear boundaries and expectations to ensure emotional and physical safety of all members, including clergy. Encourage open communication when addressing potential concerns.

Spiritual – Assist people facing challenges by fostering their faith and offering spiritual guidance.

Using the BLESS Approach to Assess and Address Unmet Core Needs

The 5 Core Needs	Assess Core Needs		Intervene to Address Primary Unmet Core Needs	
	Attend <i>(What to Observe)</i>	Ask <i>(What to Explore, Prioritize)</i>	Act <i>(What to Do)</i>	And Repeat <i>(if warranted)</i>
B = Belonging	Relationships	Social Questions	Provide Spiritual Support	<i>Address Secondary Unmet Core Needs</i>
L = Livelihood	Health and Finances	Resource Questions	Connect to Social & Healthcare Resources	<i>Address Secondary Unmet Core Needs</i>
E = Emotional	Mental Health	Well-Being Questions	Facilitate Lament	<i>Address Secondary Unmet Core Needs</i>
S = Safety	“Red Flags” (hints of experiencing violence, self-harm, or suicidal thoughts)	Threat and Harm Assessment Questions	Refer and Report	<i>Address Secondary Unmet Core Needs</i>
S = Spiritual	Meaning-Making and Religious Behaviors	Spiritual Struggles, Ultimate Questions (e.g., life and death)	Encourage Spiritual Coping	<i>Address Secondary Unmet Core Needs</i>

Drawn from Aten, J. D., Shannonhouse, L, Davis, D. E., Davis, E. B., Hook, J. N., Van Tongeren, D. R., Hwang, J., McElroy- Heltzel, S. E., Schrubba, A., Annan, K., Mize., M.C. (2020). Spiritual first aid: A step-by-step disaster spiritual and emotional care manual (COVID-19 edition). Wheaton, IL: Humanitarian Disaster Institute.

Key resources for this section and the following section include the following:

The Skilled Pastor: Counseling as the Practice of Theology, by Charles Taylor, Fortress Press, 1991 – a solid foundation for basic pastoral care that draws upon key insights from cognitive-behavioral therapy and equips people to engage with intense emotions such as anger, guilt, fear, and sorrow.

The Guide to Pastoral Counseling and Care, by Gary Ahlskog and Harry Sands, Psychosocial Press, 2000 – two chapters from this book are particularly helpful in charting helpful interactions for clergy with people experiencing different types of mental health distress.

Trauma and Recovery, by Judith Herman, Basic Books, 1997 – foundational resource for trauma-informed understanding and pathways for healing.

The Body Remembers: The Psychophysiology of Trauma and Trauma Treatment, by Babette Rothschild, Norton & Company, 2000 – a sensitive approach to aiding people in the lengthy journey of recovery from trauma, with emphasis on small steps, respect of needed safe space, and holistic reading of cues.

A Resource Booklet for Mental Health and the Spirit, by the Union of Black Episcopalians Mental Health Task Force, July 2023, <https://files.constantcontact.com/8a37aef2101/b03dcd12-22bd-4938-af47-2f869f66e017.pdf> -- a very helpful resource for faith community members and leaders in recognizing and responding to emotional signs and symptoms related to mental health challenges, particularly naming realities of anxiety, depression, anger, grief and loss, and trauma in Black communities.

Mental Health: A Guide for Faith Leaders, by the American Psychiatric Association Foundation, 2018, https://www.psychiatry.org/File%20Library/Psychiatrists/Cultural-Competency/Mental_Health_Guide_Tool_Kit_2018.pdf – a useful introduction to mental health and illness, and a guide for faith leaders in including people with mental illness and supporting mental health treatment.

For Clergy: The Caring Clergy Project, found on the website of the Interfaith Network on Mental Illness, <https://inmi.us/for-clergy/> -- this webpage provides a portal to instructional videos, tools, and resources for individual and congregational ministry with individuals with mental illness.

Compassion in Action: A Guide for Faith Communities Serving People Experiencing Mental Illness and Their Caregivers, by the Partnership Center: Center for Faith and Opportunity Initiatives, U.S. Department of Health and Human Services, July 2020, <https://www.hhs.gov/sites/default/files/compassion-in-action.pdf> -- a helpful guide compiled with people working with faith communities on best and most supportive responses to people with mental illness, providing a roadmap using seven compassion-in-

action principles that focus attention and perspective on inherent dignity, illness (not sin), caregiver, professional assistance, treatment and medication, complexity, and hope.

You Are Not Alone: The NAMI Guide to Navigating Mental Health, by Ken Duckworth and NAMI, 2022 – a direct aid for individuals and families discovering and maneuvering through the field of mental health services.

V. Family and caregiver pastoral and spiritual care, and discernment of concerns

In addition to care, support, referral, and advocacy for individuals facing mental health challenges, clergy and spiritual leaders in faith communities also provide pastoral and spiritual care to families and caregivers of people with mental health challenges. In addition to individual connections of support and care is the building of a faith community's capacity to provide connection, care, and accompaniment that assists families and caregivers.

Levels of concern and response. Levels of intensity of mental health crises or ongoing mental health challenges directly affect family, caregivers, and friends. A serious crisis, especially a first time, can overwhelm close contacts with anxiety, confusion, and fear, which can be followed by guilt, self-doubt, anger, grief, and other intense emotions. When living with, caring for, or assisting someone with persistent mental illness, there can be temptations to “go it alone” and be the source of all that the person needs; there are challenges of learning how to navigate the difference between helping and enabling, and how to find others as reliable supporters. When first facing an emerging mental health challenge in a loved one, a family member or caregiver faces challenges of not only their own disbelief but also the as-yet-unknown array of mental health services and support groups that one must discover and learn to navigate. Over the long haul, as with any caregiving, there can be weariness and exhaustion, accompanied by guilt and frustration for feeling depleted. There are cycles of hope and loss of hope, joy and anguish, relief and guarded watchfulness.

Just as with individuals experiencing different levels of intensity and duration in their own mental health challenges, there are different appropriate levels of response with family, caregivers, and friends. Crises and newly emerging mental illness may call for intervention to help family and caregivers find resources and develop new skills and habits, and to provide care and daily living assistance for family and caregivers while they put their energies into addressing the crisis at hand. As time unfolds, steady accompaniment provides family and caregivers with a sense of surrounding strength and care, and helps protect against their developing habits of “going it alone.” Ongoing support comes in many forms including conversation, assistance with household care (such as mowing the lawn or shopping for groceries), introduction to support groups and to others who face the same challenges, and providing respite by stepping temporarily into the role of caregiving. The longer work of integration happens as family and caregivers adapt to a new pattern of life and begin to interweave a new reality into their life patterns and self-understanding. This is a space for important conversations, deep listening, pastoral care and guidance, and

receiving testimony of others who are further along this journey. Growth remains an important open pathway for family and caregivers, as they incorporate their experience and new learning into their identity, and as they seek and find spaces for their own lives to flourish—both with their loved one facing mental health challenges, and independent as themselves in ways that are distinct from their role. Clergy and faith community can provide such opportunities for growth, and have conversations that open the possibility.

The curriculum provides examples and invites stories that help strengthen clergy's and spiritual leaders' abilities in assessing and identifying signs and indicators that help them discern appropriate levels and forms of response. The curriculum also stresses the continuing importance of compassionate and non-judgmental presence with families and caregivers, with devoted practice of active listening and offering of encouragement and information without moving into advice or problem-solving. Tools and best practices help clergy and spiritual leaders strengthen their skills in choosing helpful responses, identifying specific needs and paths for assistance, acknowledging and openly discussing the realities and challenges being faced, offering information and resource connection that helps address stress and nurtures well-being, encouraging self-care practices, referring for their own mental and physical health care, assisting in building familiarity with resources for the person in their care, and introducing to networks in the faith community and wider community. Learning and practicing these skills also necessitates that clergy and spiritual leaders become familiar with community resources and networks, and encourages the building of a faith community's capacities for help, support, and advocacy.

VI. Community inclusion for individuals with mental illness and their families

Community inclusion for anyone is crucial for health. The “epidemic of loneliness and isolation” in America, as highlighted by the Surgeon General (2023), points to a problem that has been increasing over generations in modern life. Humans need connection, and mental and physical health are directly affected by isolation and loneliness. The curative power of connection is even more pronounced for those who have lived with the isolation that comes with stigmatization, marginalization, and other forms of exclusion from relationships and social networks. There is important work for faith communities in fostering, modeling, and promoting community inclusion and support for individuals and their families facing mental health challenges.

Deconstructing stigma is a first essential step. Stigma can emerge in all sorts of social and relational spaces, including public and civic groups, workplaces and schools, families, neighborhoods and marketplaces, faith communities, and within oneself. To address stigma and change stigmatizing patterns of behavior, speech, and thought, education becomes paramount. Workshops, presentations, and awareness campaigns are primary tools for educating a community about mental health and the challenges faced by individuals and families. MHFA training and NAMI (National Alliance on Mental Illness) programs are two primary resources. Personal stories shared by individuals, family members, and community colleagues humanize the

experience of mental illness, challenge misconceptions, and promote empathy and understanding. Faith communities that learn to deconstruct stigma and change their patterns in order to amplify respect of each person's dignity can become examples and instructional resources as they model, practice, and teach acceptance, compassion, and inclusion.

A second crucial step is addressing barriers to inclusion that may exist on interpersonal and structural levels. Interpersonal barriers can be addressed through education and training programs that include best practices for clergy, leaders, and community members. This helps people develop skills to approach, listen to, and support individuals with mental illness and their families. Additionally, facilitating open dialogue and providing opportunities for conversations about mental health will dispel fears, assumptions, and misunderstandings. Speaking openly about the topic of mental illness helps eliminate the irrational fear of "speaking the unspeakable."

Structural barriers, on the other hand, require proactive steps to ensure equal access and participation. Conducting accessibility audits can identify and address physical barriers that individuals may face in engaging with the community. Similarly, faith communities can assess their structures, communications, and built-in patterns for unintended barriers to people wrestling with mental health challenges. This often includes addressing the absence of language or recognition of mental illness as a human reality; as with individual modeling in speaking openly about the topic, it is invaluable for a faith community to make matters of mental and physical health and illness part of the patterns of communication. In the wider community, advocacy efforts work towards influencing local policies and practices to enhance inclusivity and support for individuals with mental illness.

As a faith community develops healthier, more positive patterns of inclusion of and interaction and communication with people with mental health challenges, the community also should equip itself with strategies for dealing with inappropriate behavior and for de-escalation with individuals experiencing a mental health crisis. In addition to tools and approaches provided through MHFA, other trainings and programs can be implemented to provide clergy, leaders, and community members with the necessary tools to handle challenging situations with empathy, patience, and understanding. Critical Incident Training, often available through local police or sheriff departments and public schools, can help a faith community develop response plans that help de-escalate volatile situations and set safe space.

In addition to these tools and practices for adults, the faith community benefits from attention to the specific needs of children and youth. Providing guidance and resources for parents and clergy to explain mental illness to children helps create an understanding and compassionate environment across all ages. Age-appropriate educational materials, workshops, and support groups can provide children with the knowledge and emotional support they need to recognize and navigate behaviors they may witness within the congregation.

In-church support groups for families promote community inclusion. By establishing specific support groups for families affected by mental illness, a safe space is created for sharing experiences, offering insights and guidance, and fostering mutual support. Educational sessions or guest speakers also provide valuable information, coping strategies, and resources to families within the congregation. A faith community may choose to create a covenant akin to the United Church of Christ's WISE Congregations initiative, to establish norms and practices to be a welcoming, inclusive, supportive, and empowering community for people with mental illness.

Beyond basic welcome are steps to include people with mental health challenges in the faith community's work, discipleship, service, worship, and leadership. This may include intentional recruiting and nomination of people with mental health challenges for varied roles that draw upon their gifts and strengths as well as provide an appropriate stretch and expansion of skills.

A faith community need not attempt to build all supportive spaces alone. Forging partnerships and connections with outside support groups such NAMI is vital. Collaborating with reputable organizations provides access to additional resources, training, and support for individuals and families. Opening church or school space to such organizations and networks for gatherings and volunteer initiatives can further anchor a faith community's commitment and continued learning. These connections help ensure appropriate referrals and access to specialized care when needed.

The curriculum guides clergy and spiritual leaders in implementing these various strategies so that faith communities can welcome and embrace individuals with mental illness and their families, promote community inclusion, provide support, and foster understanding.

Key resources for this section and the following section include the following:

Our Epidemic of Loneliness and Isolation: The U.S. Surgeon General's Advisory on the Healing Effects of Social Connection and Community, by Vivek Murthy, U.S. Surgeon General, 2023 – introduces research on social connection and its decline, and health consequences; outlines the benefits of socially connected communities and outlines strengths that emerge from social connection, offering recommendations to rebuild social connection.

Developing Welcoming, Inclusive, Supportive, and Engaged Congregations for Mental Health, resolution of the United Church of Christ (UCC) for WISE Congregations, 1995 – states the case for the UCC's churchwide focus on mental health ministry:

<http://www.moredomainsforless.com/wideningthewelcome/WISEcongregationsresolutionucc.pdf>

A WISE Congregation for Mental Health, a sample congregational covenant voted and embraced by First Congregational Church of Boulder, Colorado, 2014 – setting specific goals and practices:

<https://drive.google.com/file/d/0BwnKh8CaRsKTNE9VYmxPVmIxSWM/view?resourcekey=0-inqJr-ghhlsLJN8e9bWYO>

- Living into a WISE Covenant:, in *Becoming a WISE Congregation for Mental Health*, United Church of Christ Mental Health Network, pp. 11-13, 2019 – pages 11-13 map out basic action steps for a local faith community:
<http://moredomainsforless.com/mhnucc/becomingaWISEcongregationformentalhealth2019ed.pdf>
- Ten Steps for Developing a Mental Health Ministry in Your Congregation, by Alan Johnson and the Interfaith Network on Mental Illness, 2017 – a solid checklist for what a local faith community can develop for mental health ministry: https://inmi.us/wp-content/uploads/2017/04/10_steps_handout_10-2013.pdf
- Liturgical Sources for Mental Health and Well-Being, by The Church of England – worship services, thematic scripture readings, prayers, and responsories for use in faith communities: <https://www.churchofengland.org/sites/default/files/2021-10/liturgical-resources-for-mental-health-wellbeing.pdf>
- Spiritual Support Group for Mental Health and Wellness Guidelines, by congregation members of First Congregational Church in Boulder, Colorado, 2012 -- sample meeting norms, expectations, and boundaries for a support group: <https://inmi.us/wp-content/uploads/2017/04/Spiritual-Support-Group-Guidelines-2.pdf>
- Healthy Boundaries: Persisting in Sharing Christ's Love, by the Anabaptist Disabilities Network, 2018 – this website also contains helpful resources for congregations on setting healthy boundaries, post-traumatic stress disorder, suicide response, and mental health education: <https://www.anabaptistdisabilitiesnetwork.org/Resources/Mental-Health/Healthy-Boundaries/Pages/default.aspx>,
<https://www.anabaptistdisabilitiesnetwork.org/Resources/ADNotes/Pages/Setting-Healthy-Boundaries.aspx>
- Hospitality towards People with Mental Illness in the Church: a Cross-cultural Qualitative Study, by C. Lehmann et al. in *Pastoral Psychology*, 71(1), pp. 1-27, 2022 – this article helps highlight the importance of hospitality as a cornerstone of welcome and inclusion of people with mental illness, and points to ethnic and cultural differences in understanding of how hospitality is exercised: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8554182/>
- Dealing with Destructive Behavior, in *Becoming a Safer Congregation: A UU Guide to Effective Safety Policies and Practices*, by Kim Sweeney and the Unitarian Universalist Association, 2018 – This excellent resource is contained within a manual that also addresses covenants of safety, security, active shooter protocols, and other matters of safety in ministry and on social media: <https://www.uua.org/safe/handbook/covenant/dealing-disruptive-behavior>
- Education & Training Programs of the International Critical Incident Stress Foundation, Inc. -- this site provides access to enrollment in online learning programs for individual and group crisis intervention: <https://icisf.org/education-training/>
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The Pursuit of Illness for Secondary Gain, by Ruth Davidhizar, in *Health Care Supervision*, 13(1), 1994 – this article raises the difficult topic of secondary gain, or positive advantages that emerge with or accompany primary symptoms of physical or mental illness.

An additional, more recent article online provides a helpful and compassionate consideration of secondary gain and how it functions to deal with secondary loss. Secondary Gains and Trauma Treatment, by Arielle Schwartz, at *Center for Resilience Informed Therapy*, August 2017: <https://drarielleschwartz.com/secondary-gains-and-trauma-treatment-dr-arielle-schwartz/>

VII. Care for community in balance with individuals' mental health/illness

Caring for the community in balance with individuals' mental health and illness is an important aspect of the life and health of the Church that requires attention and consideration. It involves establishing and maintaining clear boundaries, acknowledging and addressing mental health issues, distinguishing between primary signs and symptoms and patterns of "secondary gain," developing action plans and standard responses, and addressing and discussing the impact of any crises that may occur and affect the community directly.

Establishing and maintaining clear boundaries requires a balance between free range of expression and interaction on one hand and care for the safety and well-being of the community on the other hand. Boundaries are not meant to restrict, but are intended to create a space for healthy interactions that diminish anxiety and foster courage in openness and ease in being with one another. Such boundaries need not be over-restrictive, but set parameters for what is understood as not acceptable. Clearly communicated expectations and limits help individuals feel respected and valued as part of a community that shares a covenant of understanding. Clearly stated boundaries, mutually affirmed, help everyone self-regulate.

Creating a positive environment for both the community that includes individuals with mental health problems begins with acknowledging the reality of mental illness and mental health challenges, including behaviors and interactions that can create discomfort for others. Ignoring these impacts of mental health problems only allows unhelpful patterns to develop and frustrations and resentments to form, as patterns of behavior and interaction become the unacknowledged "elephant in the room." By acknowledging and openly discussing specific difficult behaviors and interactions with *any* individual, the community sets a pattern of accountability and concern with all its members, including but never exclusively singling out individuals with mental health challenges.

In relation to both critical incidents and other disruptive situations, there may be need for immediate response calling on a faith community's Critical Incident Training and developed plan for action. Rapid assessment calls for evaluation of how dangerous the incident or situation is. If not dangerous, the situation may still be disruptive, or it may be deeply offensive. These are helpful benchmarks for intervention.

In time, some members and leaders in faith communities can become more attuned to distinctions between primary signs and symptoms of mental health distress and patterns of what is known as “secondary gain.” Primary signs and symptoms are direct expressions and experiences of a mental health condition. “Secondary gain” is a pattern of behavior that can emerge with some individuals who have a physical or mental illness or disability, who begin to seek advantages by exaggerating symptoms of presuming privilege and making demands on others because of illness or disability. It is a cautious matter to consider such distinctions, and yet there are situations in which people can “play the part” in order to solicit help and shift responsibility. If a question of possible “secondary gain” patterns arises, it is best to approach conversation about this in a spirit of curiosity and inquiry: “Is this something you can do for yourself and want to be able to do for yourself?” Distinguishing between primary and secondary issues helps supportive community members navigate the tension between assisting and enabling, and can help bolster the autonomy and self-direction of a person, even if that person may initially resent a refusal to do something for them when they can do and have done it for themselves or with some companioning assistance.

Minimizing the spread of the impact of certain behaviors is also crucial to maintaining balance. Some mental health issues, such as addiction or certain disorders, can have a ripple effect on the community. By implementing strategies to reduce the negative impact of these behaviors on others, the community can minimize the potential harm and promote overall well-being.

Developing action plans and standard responses is a proactive approach to caring for the community while also considering individuals’ mental health and illness. By having predetermined strategies and procedures in place, the community can respond effectively and efficiently to various situations. This not only ensures the safety and support of individuals affected by mental health issues but also fosters a sense of unity and understanding within the community.

In conclusion, caring for the community in balance with individuals’ mental health and illness requires a multifaceted approach that includes establishing boundaries, acknowledging and addressing mental health issues, distinguishing between primary symptoms and secondary patterns, minimizing the spread of impact, and developing action plans. By prioritizing mental health and providing support, communities can create an environment that promotes well-being and fosters a sense of belonging for all.

VIII. Self-recognition, self-review, self-restoration, self-resilience, self-strength

When it comes to mental health, it can be too easy for clergy and spiritual leaders to neglect their own well-being. But care for one’s own mental health is essential in order to effectively support others. Care and management of one’s own mental health involves ongoing self-recognition and self-review, times of self-restoration, resources for self-resilience, and building of self-strength.

Self-recognition is the ability to identify your own mental health needs, challenges, and patterns. This involves developing some basic habits of taking stock of oneself, not unlike stepping on the

scale or looking in the mirror daily, and akin to the Daily Examen of the Jesuits. In the rapid and pressured pace for clergy on the go and responding to multiple and competing pressures, this habit of practicing self-recognition can become easy to overlook.

Self-recognition and self-review may look like different things for different people, but some common signs of deteriorating mental health that deserve immediate attention include the following:

- Feeling overwhelmed, stressed, or anxious
- Having trouble sleeping or concentrating
- Feeling irritable or withdrawn
- Losing interest in usually enjoyable activities
- Having thoughts of self-harm or suicide

If any of these signs are manifesting, it is important to take action. Action begins with conversation with someone trusted: a friend, family member, therapist, physician, or fellow religious leader. It is especially important to reach out for professional help when one senses being “in over one’s head” -- whether that overwhelmed experience is situational, work-induced, familial, or internal. At any time but especially in times of mental health distress, networks of support are invaluable. Such networks may include friends, family, colleagues, people experiencing similar challenges, neighbors, and mental health professionals. Clergy are not beyond the need for emotional support, practical assistance, and accountability.

Debriefing is the process of talking about and processing difficult experiences. This is a helpful for clergy and spiritual leaders anytime, as a preventative and self-care practice. It is especially important for processing intense experiences, traumatic events, and experiences of cumulative grief, moral injury, constant criticism, or negative self-assessment. Debriefing can be done one-on-one with a therapist, a fellow religious leader, or another trusted person, and can also be done in colleague groups or support groups.

Saying “No” can be difficult for clergy and spiritual leaders, who often feel a sense of obligation to help others. The practice of saying “No” is not only part of self-care, it is also part of helping others find and exercise their own autonomy and capacities. Saying “No” need not be confrontational or dismissive; it can be delivered in the form of saying “Not yet,” “Not at this time,” or “Not me.” Setting this pattern early in a position of leadership is easier than re-setting patterns and expectations later. The following is a review list for clergy who likely know about these helpful solutions but may struggle to put them into practice:

1. Set personal boundaries.
2. Prioritize obligations: With multiple responsibilities and obligations, in order to avoid being overwhelmed or spreading themselves too thin, it is invaluable to prioritize commitments

and politely decline those that do not align with primary duties or would negatively impact core responsibilities.

3. Offer alternative solutions: Instead of outright refusing a request, clergy can suggest other individuals or resources that might be more suitable.
4. Explain limitations: Clergy acknowledge their humanity by explaining limits of time, resource, and expertise, and noting need for personal space or rest.
5. Maintain transparency: A “No” is received and understood when explained with transparency and respect.

Self-care is any activity that you do to take care of your physical, mental, and emotional health. Self-care is not about being selfish or lazy. It is about making your own needs a priority so that you can better serve others.

Examples of self-care include:

- Getting enough sleep
- Eating healthy foods
- Exercising regularly
- Spending time with loved ones
- Engaging in hobbies or activities that you enjoy
- Turning off work and taking breaks from work

The curriculum encourages clergy and spiritual leaders to take stock of themselves and their self-care practices, utilizing tools such as the Daily Examen, a time diary, and a listing of self-care practices. Some examples of how clergy members can practice self-recognition, self-review, self-restoration, self-resilience, and self-strength when dealing with mental health are as follows:

- Self-recognition—Keep a journal to track thoughts and feelings, to help identify patterns and triggers.
- Self-review—Take time each week to reflect on mental and emotional responses through the week.
- Self-restoration—Schedule regular breaks, commit to a day off, take a walk, spend time with loved ones.
- Self-resilience—Strengthen coping mechanisms for stress and difficult emotions. Exercise, meditate, pray.
- Self-strength—Build a strong network of support to help through normal and challenging times.

IX. Response to trauma in the wider community

No curriculum on mental health ministry would be complete without attention to the matter of trauma, particularly communal trauma. Response to trauma in the wider community involves crisis pastoral care, practical immediate and longer-term assistance, collaboration with others, ongoing care of stress response, and partnerships to address trauma-related issues, and restoration of community wellness, equity, and empowerment.

In the face of community trauma, pastoral response must be both immediate and ongoing. This requires informational contact with first responders and organizations in direct contact with areas affected, consultation and agreement on how to offer pastoral care and support, and awareness of the impact of trauma on individuals and groups in the community. In cooperation with other religious and secular care providers, clergy and spiritual leaders work with pastoral volunteers to provide immediate emotional and spiritual support to those affected, and develop strategies for ongoing pastoral care to address long-term healing and recovery.

Preceding and parallel with pastoral care is the provision of needed practical assistance. Community trauma may be linked to natural disasters, massive infrastructure problems, other significant accidents, or violence, each leaving structural, institutional, and physical damage in its wake. Relying once again on informational contact and consulting cooperatively with other organizations, clergy and faith community members work to assist in providing for practical needs arising from trauma. Immediate and continuing mobilization of resources and volunteers ensures a valued and sustained contribution to aid, relief, and recovery efforts. Faith communities and their clergy should not act in isolation. Practical aid is best delivered in collaboration and in concert.

It is rare that effective and full trauma response will be within the scope of any individual faith community, and it is a rarity for any faith community to take a principal leading role in trauma response. Humility and readiness to accept direction are important elements in a faith community's collaboration in response to trauma. Knowing the strengths and talents that the faith community can offer in the situation, clergy and other leaders can arrive with suggestions of how they can help in distinct ways. The strongest collaborative relationships and partnerships are often formed prior to crises – faith communities can initiate efforts to build partnerships with inter-church groups, non-governmental organizations (NGOs), government agencies, educational institutions, health programs, protective services, and neighborhood associations. Some of these partnerships will develop quickly in the midst of trauma response, but seeds of connection sown in prior days will facilitate more rapid coordinated response.

The capacity of a faith community's response to trauma is strengthened by its preparation and planning. This includes taking stock of available resources within the congregation, school, or organization that can be utilized during a trauma event; developing disaster preparedness plans

to efficiently respond to potential future incidents; and establishing relationships with community organizations in advance to strengthen the overall response system.

Initial response to community needs will likely lead to recognition of the need for additional learning and training. For instance, a parish in eastern Washington state saw a need to step into the gap in provision of cold weather shelter for people without homes. This was an important contribution to community services. As the team of volunteers engaged this work, they encountered mental health challenges and were not equipped for effective response. Between their first and second winters of offering this important ministry, they sought MHFA training to strengthen their mental health responses.

Responses to trauma have often not been equitable. Large-scale responses have left marginalized people with less power and resources than prior to the traumatic event. Episcopal faith communities with their clergy and spiritual leaders must keep their focus on promoting wellness, equity, and empowerment in trauma response efforts, with particular concern for communities at risk of being marginalized or neglected. Over the long term, faith communities help strengthen their wider communities and groups at risk by addressing systemic issues that contribute to vulnerabilities to trauma, working toward justice and equity in the community, and empowering people affected by trauma in their own processes of healing.

Trauma has enduring effects on individuals and communities, with impact that crosses generations. This curriculum equips clergy and spiritual leaders with resources to help faith communities understand long-term and generational trauma; the impacts of trauma on mental, emotional, physical, relational, and spiritual well-being; and cooperative approaches to break cycles of generational trauma and open paths of healing.

X. Establishing resource connections in one's community

This curriculum assists faith community members and leaders in establishing resource connections within their community, by identifying, leveraging, and developing working relationships with available mental health practitioners, support groups, and other resources. The following are steps that leaders complete in relation to their contexts of ministry:

A. Identify mental health practitioners within the faith community

- Invite faith community members who are mental health practitioners to identify themselves.
- Facilitate connections between these practitioners and ask them to offer their services and support in the faith community in ways similar to the model of parish nurses.
- Establish guidelines for appropriate referral and confidentiality practices.

B. Identify local public health, NAMI, and other social service and support resources

- Conduct a preliminary web search for community resources or access published regional lists.

- Ask members to expand and refine this list, and to include local public health offices and NAMI branches.
- Identify support groups, educational programs, and other resources offered by these organizations.
- Publish and distribute this list to members, post resources as appropriate on faith community websites, and promote awareness of mental health services available.

C. Expand Beyond Mental Health Providers

- Expand the list to include professionals and support resources in other areas of life where people may experience challenges, such as financial assistance, medical and dental aid, transportation, job assistance, and legal services.

D. Establish and strengthen community partnerships

- Recruit a team within the faith community to build relationships and partnerships with community organizations such as social service agencies, nonprofits, and educational institutions.
- Collaborate with these organizations on awareness-building events.
- Identify opportunities for joint initiatives, workshops, or outreach programs that address mental health needs in the community and expand access to resources.

E. Map clear referral processes and coordination of information

- Develop clear referral processes to connect individuals with mental health providers and support resources.
- Open procedures for appropriate release of information between clergy and professionals in mental health.
- Ensure confidentiality and privacy throughout the referral and coordination processes.

Examples of helpful resources posted for a diocese can be found with the Diocese of New Jersey (<https://njmindspirit.org/>) and the Diocese of Pennsylvania (<https://www.ecsphilly.org/news-events/forum2023/>).

XI. Alliance and advocacy

The curriculum concludes with this section aimed at equipping church members and leaders with the knowledge and skills to engage in alliance-building and advocacy efforts for the sake of promoting mental health and well-being, strengthening and improving mental healthcare services in all communities, and setting preventative measures and practices in place in society in order to reduce the incidence of mental illness.

A. Advocacy for individuals and families

Individual and familial advocacy is very direct alliance, assistance, and lending of influence and strength to help specific individuals and families face challenges, overcome roadblocks, and maneuver through mazes in healthcare systems, legal or financial systems, and other public or private support systems. Specific faith community members and leaders will have more skill in offering this kind of support, and others will be able to learn skills. A key part of such advocacy is willingness and readiness to be a voice and visible ally for those experiencing mental health challenges.

Faith communities can collaborate with networks such as NAMI to provide training on effective advocacy techniques in order to assist people in navigating mental health systems, accessing appropriate care, and advocating for their rights and needs.

B. Legislative advocacy for mental health care

At a regional, state, or nationwide level, advocacy involves raising awareness among legislators and policy makers about mental health needs in communities and pressing for improvement in mental health care. Clergy and spiritual leaders help shape such purposeful engagement among subsets of faith community members, assist in connecting them with allies and networks engaged in mental health advocacy, help them learn how to connect with current legislative initiatives on mental health, and encourage their training and learning of methods for engaging elected officials in written and more direct lobbying efforts.

C. Crisis response and alternatives

One specific topic to engage as advocates is around protective services' crisis response and engagement with mental illness. Forming watchdog groups and creative innovator groups to help police assess and improve their responses to mental health emergencies and to explore alternative crisis response methods and personnel are two examples of such advocacy. Such action may include advocating for the implementation and funding of crisis teams as a more appropriate and compassionate response to calls involving mental health crises. Clergy and spiritual leaders can help find learning opportunities for faith community members on crisis intervention techniques and ensure awareness of local resources for mental health emergencies.

D. Resources for alliance and advocacy

There are multiple organizations engaged in advocacy related to mental health, including the Episcopal Office of Government Relations and the Episcopal Public Policy Network, the American Psychological Association, and the National Alliance on Mental Illness (NAMI). Working with such organizations amplifies advocacy efforts in one's community, region, and state. This curriculum provides information on how to access these resources, and provides basic guidance for facilitating effective alliance-building and advocacy efforts with these organizations.

⁴ Heseltine-Carp, W., & Hoskins, M. (2020). Clergy as a frontline mental health service: a UK survey of medical practitioners and clergy, *General Psychiatry*, 33(6).

TASK FORCE ON LGBTQ+ INCLUSION

Members

The Rev. Cn. Susan Russell, Chair	Los Angeles, VIII	2027
The Rt. Rev. Thomas Brown	Maine, I	2027
Mx. Samantha Christopher	Arizona, VIII	2027
Mr. Jay Elmquist	Northern California, VIII	2027
The Rev. Shug Goodlow	Missouri, V	2027
Mr. Dennis Kirchoff	Arizona, VIII	2027
The Rev. Tory Moir	Colorado, VI	2027
The Rev. RJ Powell	East Tennessee, IV	2027
Mr. Paul Ricketts	Northern Indiana, V	2027
Mx. Emily Rowcliffe	East Tennessee, IV	2027
The Rt. Rev. Kathryn Ryan	Texas, VII	2027
The Rev. Iain Stanford	California, VIII	2027
The Rev. J. Gregory Stark	Convocation of Episcopal Churches in Europe, II	2027
The Rev. Bryan Vélez-Garcia	Puerto Rico, II	2027
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2027
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024

Changes in Membership

The Reverend Iain Stanford – a valued member of this Task Force and a trailblazer in LGBTQ inclusion as one of the first transgender priests in the Episcopal Church died on July 10, 2023. May he rest in peace and rise in glory – and may his memory be a blessing and an inspiration.

Representation at General Convention

Deputy RJ Powell (East Tennessee) and Bishop Thomas Brown (Maine) are authorized to receive non-substantive amendments to this Report at the General Convention

Mandate

2022 - D026 Create a Task Force on LGBTQ+ Inclusion

Resolved, the House of Bishops concurring,

That it is the intention of The Episcopal Church to continue our becoming “The Beloved Community;” a charism of which is a church that functions with equity and care for the whole body, including its LGBTQ+ members; and be it further

Resolved, That the 80th General Convention direct the Presiding Bishop and the President of the House of Deputies to appoint jointly a Task Force on LGBTQ+ Inclusion, consisting of not more than 14 people, to include 2 bishops, 6 priests or deacons and 6 lay people, who represent the diversity of the LGBTQ+ members of this Church; and be it further

Resolved, That the Task Force initiate a churchwide audit of how The Episcopal Church has lived into its 1976 commitment to provide full and equal claim to the love, acceptance and pastoral concern and care of the Church to its LGBTQ+ members; and be it further

Resolved, That the Task Force begin the process of creating an archive of the history of the work for LGBTQ+ inclusion in The Episcopal Church; and be it further

Resolved, That the task force begin its work no later than January 1, 2023, with the task concluding its work at the conclusion of the 82nd General Convention, unless its mandate is extended by the 82nd Convention; and be it further

Resolved, That the task force provide an interim report to the 81st General Convention and a final report with recommendations to the 82nd General Convention; and be it further

Resolved, That the General Convention request the Joint Standing Committee on Program, Budget and Finance to consider a budget allocation of \$100,000 for the implementation of this resolution, \$30,000 to be allocated to the first triennium and the remainder to the second.

Summary of Work

Introduction and summary

The Task Force held two in person meetings in March and October 2023 and met periodically over Zoom as a committee of the whole and in two working subcommittees: Archives and Audit. The scope of our work for this shortened triennium was to create initial plans to implement the two-fold directive to audit how the Episcopal Church has lived up to its commitment to full inclusion for its LGBTQ+ members and to archive the history of LGBTQ+ inclusion in the Episcopal Church

Summary of the Legislative History of LGBTQ+ Inclusion in the Episcopal Church

The Episcopal Church has been officially debating the issue of human sexuality in general and how it applies to LGBTQ people in specific since the General Convention of 1976 when resolutions adopted by the Bishops and Deputies began to frame the parameters of the debate. In the intervening years resolutions have been passed and then amended as the church's position has evolved in response to the dialogue.

In 1976, the 65th General Convention of the Episcopal Church asserted in Resolution 1976-A069 that *"homosexual persons are children of God who have a full and equal claim with all other persons upon the love, acceptance and pastoral concern and care of the Church"* and faithful witnesses to God's inclusive love have been working ever since to make that resolution a reality for all members of the human family. And it declared in resolution 1976-A071 *"That the General Convention expresses its conviction that homosexual persons are entitled to equal protection of the laws with all other citizens and calls upon our society to see that such protection is provided in actuality."*

70th General Convention | Phoenix 1991 - In 1991, at the General Convention held in Phoenix acknowledged its inability to resolve the complex issues surrounding human sexuality by means of the normal legislative process. The Convention opted instead for a process of continued study and dialogue across the whole church, with a report to be issued from the House of Bishops.

71st General Convention | Indianapolis 1994 - Resolution 1994-B012 - Authorize Appointment of a Committee on Dialogue on Human Sexuality - was adopted, calling for the study of *"Continuing the Dialogue"* and *"commit to dialogue in faith with no expectation of uniformity."* Additionally, the canons on ordination were amended to add sexual orientation to Title III, Canon 4, Section 1: *"All Bishops of Dioceses and other Clergy shall make provisions to identify fit persons for Holy Orders and encourage them to present themselves for Postulancy. No one shall be denied access to the selection process for ordination in this Church because of race, color, ethnic origin, sex, national origin, marital status, sexual orientation, disabilities, or age, except as otherwise specified by these Canons."* -- *Title III, Canon 4, Section 1 of the Constitution and Canons for the Government of the Episcopal Church in the United States of America, p. 60*

The Righter Trial

In 1996, the Court of Trial for a Bishop refused to hear charges filed against Bishop Walter Righter for ordaining a gay man living in a relationship. The court said there was no doctrine against such an ordination and that there was no canonical bar to gay and lesbian ordination in the Episcopal Church.

72nd General Convention | Philadelphia 1997 – Resolutions adopted in Philadelphia included 1997-C024 – approving the option of extension of healthcare benefits to the partners of clergy and lay employees in dioceses and 1997-D011 – apologizing on behalf of the Episcopal Church to its members who are gay and lesbian and to the lesbians and gay men outside the Church for years of rejection and maltreatment by the Church and affirming that this Church seeks amendment of our life together as we ask God's help in sharing the Good News with all people.

1998 Lambeth Conference of Anglican Bishops - In 1998, the Lambeth Conference of Anglican bishops, meeting in July at their every ten-year gathering in Canterbury, adopted Lambeth Resolution 1:10 -- which was entitled *"Human Sexuality"* and included the majority opinion of the bishops gathered at that conference that *"homosexual practice is incompatible with Scripture"* and *"cannot advise the legitimising or blessing of same sex unions nor ordaining those involved in same*

gender unions." Much energy has been spent over the intervening years debating whether that language was descriptive of the bishops gathered at Lambeth '98 or proscriptive for the wider communion.

73rd General Convention | Denver 2000

A number of LGBTQ+ affirming resolutions were adopted in Denver, including 2000-A009 - Identification of Safe Spaces: establishing a formal process for congregations to identify themselves as safe spaces for GLBT people; 2000-A046 - Urge Conversation with Youth and Young Adults About Sexuality; 2000-A080 - Commend Dialogue on Fidelity in Human Relationships; 2000-C031 - Recommend Engaging the Boy Scouts on Issues of Sexuality Orientation and 2000-D039 - Acknowledge Relationships Other Than Marriage and Existence of Disagreement

2000-D039 was adopted overwhelmingly by a voice vote in the House of Deputies and by a 119 -19 margin in the House of Bishops. An "8th Resolve" which called for the preparation of rites for inclusion in the Book of Occasional Services failed to pass by a narrow margin in both houses. However, this important resolution broke new ground by moving the Episcopal Church into conversations about relationship that transcend sexual orientation ... and set the stage for the 2003 General Convention in Minneapolis.

74th General Convention | Minneapolis 2003

In addition to consenting to the election of V. Gene Robinson as the 9th Bishop of New Hampshire, the 2003 General Convention in Minneapolis adopted 2003-C051-Blessing of Committed Same-Gender Relationships -- a landmark resolution moving the church forward on the blessing of same-sex unions. Key resolves included of this important resolution included:

Resolved, That we reaffirm Resolution D039 of the 73rd General Convention (2000), that "We expect such relationships will be characterized by fidelity, monogamy, mutual affection and respect, careful, honest communication, and the holy love which enables those in such relationships to see in each other the image of God," and that such relationships exist throughout the church, and be it further

Resolved, That we recognize that local faith communities are operating within the bounds of our common life as they explore and experience liturgies celebrating and blessing same-sex unions.

2003 – 2006

Following the gains made in Minneapolis in 2003, pressure was put on the wider Anglican Communion to censure the American Episcopal Church. In 2004 "The Windsor Report" – calling for moratoria on further consecrations of LGBTQ bishops and blessing of same-sex unions – was published. In response, The Episcopal Church presented "To Set Our Hope on Christ" at the 2005 meeting of the Anglican Consultative Council – a response to the Windsor Report making the biblical and theological case for the full inclusion of LGBTQ+ people in the Body of Christ.

75th General Convention | Columbus 2006

The 2006 General Convention was consumed by responding to the Windsor Report and whether or not American bishops would be invited to the 2008 Lambeth Conference. After nine days of legislation, resolutions insisting on "compliance" with aspects of the Windsor Report that recommended a moratorium on the blessing of unions or discrimination against partnered gay or lesbian candidates for bishop were rejected and a series of "response to Windsor" resolutions were adopted.

Those resolutions included 2006-A159 - Affirm Commitment to the Anglican Communion; 2006-A160 - Express Regret for Straining the Bonds of the Church; 2006-A165 - Commend the Windsor Report and Commit to the "Windsor Process"; 2006-A166 - Support Development of an Anglican Covenant.

In addition, General Convention adopted 2006-A167 - Reaffirm Church Membership of Gay and Lesbian Persons; 2006-A095 - Reaffirm Support of Gay and Lesbian Persons; 2006-D005 - Oppose Criminalization of Homosexuality.

On the 10th and last legislative day, an unprecedented joint session of the Houses of Bishops & Deputies was presented with 2006-Resolution B033 by then Presiding Bishop Frank Griswold. The resolution that was adopted by both houses was entitled "Exercise Restraint in Consecrating Candidates" and read:

Resolved, That the 75th General Convention receive and embrace The Windsor Report's invitation to engage in a process of healing and reconciliation; and be it further

Resolved, That this Convention therefore call upon Standing Committees and bishops with jurisdiction to exercise restraint by not consenting to the consecration of any candidate to the episcopate whose manner of life presents a challenge to the wider church and will lead to further strains on communion.

2008 Lambeth Conference of Anglican Bishops

In 2008 the Lambeth Conference of Anglican bishops was held in Canterbury. The Bishop of New Hampshire was not invited to attend. However, dire predictions of actions to censure or marginalize bishops from The Episcopal Church failed to materialize and a large contingent of LGBTQ+ Episcopalians and allies were part of the Inclusive Communion Witness in Canterbury.

76th General Convention | Anaheim 2009

Two primary goals were set out for this General Convention by LGBTQ activists: moving beyond B033 and forward on the blessing of same sex unions. Both were accomplished with the adoption of 2009-C056 and 2009-D025 ... calling on the Standing Commission on Liturgy and Music to collect and develop theological and liturgical resources for the blessing of unions of same-sex couples and ending the de facto moratorium on the election of LGBTQ+ people to the episcopate. The 76th General Convention also adopted the Episcopal Church's first-ever resolution addressing gender identity: 2009-D012 - Support Laws that Prohibit Discrimination Based on Gender Identity.

77th General Convention | Indianapolis 2012

A significant number of LGBTQ+ related resolutions were adopted by the 77th General Convention meeting in Indianapolis in July of 2012. They included authorizing liturgies for blessing same-sex relationships, creating a task force to study marriage in general and the marriage of same-sex couples in specific, standing in support of civil marriage for same-sex couples and opposing transgender discrimination.

2009-A049 - Authorize Liturgical Resources for Blessing Same-Gender Relationships.

2009-A050 - Create Task Force on the Study of Marriage.

2009-D018 - End Discrimination Against Same-Sex Marriages.

2009-D002 - Affirming Access to the Ordination Process (ending discrimination against transgender ordination).

2009-D019 - Adding Gender Identity and Gender Expression to Non-Discrimination Canons.

2009-D061 - Adopt Statement on Threats to Sexual Minorities.

78th General Convention | Salt Lake City 2015

In 2015, the 78th General Convention of the Episcopal Church met in Salt Lake City — where there was extraordinary progress toward the goal of ending marriage discrimination with the adoption of resolutions that amended Episcopal Church canons on marriage to be inclusive of same-gender spouses and approved liturgies for equal use by same and opposite sex couples.

2012-A036 - Amend Canon I.18 [Of the Solemnization of Holy Matrimony].

2012-A037 - Appoint Expanded Task Force on the Study of Marriage.

2012-A054 - Authorize Trial Use of Marriage/Blessing Rites.

Authorization of the rites for marriage were placed under the authority of the bishop with jurisdiction with the caveat: *"Bishops exercising ecclesiastical authority or, where appropriate, ecclesiastical supervision, will make provision for all couples asking to be married in this Church to have access to these liturgies."*

The 78th General Convention also adopted the following resolutions: 2015-D051 - Support LGBTI Advocacy in Africa; 2015-C037 - Support and Sponsor Boy Scout Units -- supporting the move to inclusive scouting; 2015-D037 - Amend Church Records to Reflect Name Changes.

2015 – 2018

It bears noting that during this triennium the full inclusion of LGBTQ+ people in the Episcopal Church received unwavering and explicit support from our Presiding Officers: Presiding Bishop Michael Curry and President of the House of Deputies Gay Clark Jennings.

79th General Convention | Austin 2018

Resolution 2018-B012 Marriage Rites for the Whole Church gave rectors or clergy in charge the ability to provide access to the trial rites for marriage. Changes to the prayer book on marriage were deferred along with other prayer book revisions. Additionally, a resolution calling for a Task Force on Communion Across Difference -- to "seek a pathway toward mutual flourishing" -- was adopted.

The 79th General Convention also adopted 2018-A088 - Proposed Guidelines For Amending Church Records; 2018-A086 - Authorize Rites to Bless Relationships; 2018-C022 - Support End of Discrimination Against Transgender and Non-Binary People and 2018-C054 - Adopt Guiding Principles for Inclusion of Transgender and Non-Binary People.

80th General Convention | Baltimore 2022

In 2021 -- leading up to the 80th General Convention -- an official LGBTQ Caucus was convened: a first for the Episcopal Church. President of the House of Deputies Gay Clark Jennings appointed the Reverend Charles Graves IV and Deputy Joe Rania to be the recipients and coordinators of the list of LGBTQ+ deputies and alternates interested in caucusing together.

An inaugural meeting of the Caucus was called on November 20, 2021 and the opening remarks included this summary of its the scope of work: "Our purpose is simple: to mobilize and advocate for the full inclusion of LGBTQ people in the work and witness of the Episcopal Church. We are the new wine skin for the new wine of an LGBTQ Caucus made up of Deputies to General Convention in collaboration with grassroots LGBTQ leaders around the church focused on advancing a legislative agenda supporting the fuller inclusion of LGBTQ people in the Episcopal Church, the witness of TEC to oppose discrimination and oppression of LGBTQ people in the wider church and the world and supporting the election of LGBTQ people and allies to leadership positions in TEC."

The 80th General Convention met in Baltimore July 8-12, 2022 with a shortened format due to COVID-19 restrictions with only Deputies and First Alternates in person for four days of legislative sessions. In spite of the shortened format the movement for LGBTQ+ Inclusion & Equity made significant legislative gains, including: 2022-A063 - Directing TEC to establish a staff position, of Director of LBGTQI and Women's Ministries; 2022-D045 - Calling on the Episcopal Church to support protection of persons forced to seek refugee or asylee status because of persecution because they are LBGTIQ+; 2022-D060 - Lamenting the harm done to LGBTQ persons throughout the world during COVID-19 restrictions; 2022-D066 - Supporting gender affirming care at local, state and national levels and asserts that the protection of religious liberty extends to all Episcopalians who may need or who offer gender affirming care.

Also adopted was resolution 2022-D026 - Creating a Task Force on LGBTQ+ Inclusion, charged with initiating a churchwide audit of how TEC has lived into its 1976 commitment to provide full and equal claim to the love, acceptance and pastoral concern and care of the Church to its LGBTQ+ members and beginning the process of creating an archive of the history of the work for LGBTQ+ inclusion in TEC. The Task Force was funded through 2027 and began its work in January 2023.

Archiving Our History: Telling Our Stories

The summary of the legislative history offered above is a timeline of benchmarks in the ongoing journey toward making the 1976 promise of full and equal claim to LGBTQ+ Episcopalians not just a resolution but a reality. The work of the Archive team is to dig deeper – and to begin the process of preserving for The Episcopal Church the rich history of the stories behind the movement for full inclusion for LGBTQ+ people over the decades – including first-person narrative histories, photographs, videos, and historical documents.

First steps toward initiating that process have included researching existing Episcopal Church and LGBTQ Archives and beginning to build a container to both receive and make available archival resources to the wider church.

The Archives subcommittee is beginning that work with a narrative history project launching in January 2024 reaching out to a crowd-sourced list of nearly 100 Episcopal LGBTQ elders and allies – inviting them to share stories of both celebration and struggle.

Auditing Our Present: Toward an LGBTQ+ Audit

The scope of work of this audit is creating a snapshot of how the Episcopal Church is measuring up to the General Convention's statements over the years regarding LGBTQ+ people and whether it complies with Canons mandating full inclusion. As with any audit or study regarding real people, both quantitative and qualitative metrics will be necessary to provide the fullest possible picture. And since this study focuses on those who have been historically marginalized – and in some places continue to experience marginalization – we are developing a multi-staged mixed method study to find and capture stories and experiences – along with hard data – which will equip us to monitor the church's progression toward full inclusion and justice for LGBTQ+ people.

In the first stage of our audit, we plan to gather both quantitative data and qualitative input – recognizing that the nature of our charge is to gain a better understanding of how we as a Church are living into the promises we have made. We will start with what we know by getting out into the weeds to thrush out the stories from the margins from those serving or having previously served and worked throughout the echelons of our Church: from the Presiding

Officers, Deputies, and Bishops of the General Convention, to Diocesan Standing Committees and Parish Vestries.

We will also explore networks of cooperation over the decades including both official caucuses of General Convention Deputies and ancillary organizations such as Integrity, Oasis Ministries, TransEpiscopal, Claiming the Blessing, the Chicago Consultation and others who have operated from the margins.

From there, the next stage of audit is to identify, collect, and present stories from the ground level that we hope will give insight to both our Church's strengths and successes in the efforts toward fuller inclusion of LGBTQ+ people, but also our shortcomings and areas of needed growth. It is also our expectation that this Task Force, based on its findings, will have some suggestions for moving forward a better understanding and better equipping of God's people in the work of love and justice within our Church and in the world.

TASK FORCE ON THE STATE OF MEMBERSHIP IN THE EPISCOPAL CHURCH

Members

The Rev. Paul Canady, Chair	East Carolina, IV	2024
Ms. Diane-Louise (D-L) Casson, Secretary	Delaware, III	2024
The Rev. Canon Lydia Kelsey Bucklin	Northern Michigan, V	2024
The Rt. Rev. Mark Cowell	Western Kansas, VII	2024
Ms. Laura Curlin	California, VIII	2024
The Rt. Rev. Glenda Curry	Alabama, IV	2024
Russell "Jack" Drake	Alabama, IV	2024
The Rt. Rev. Elizabeth Bonforte Gardner	Nevada, VIII	2024
Ms. Lindsey E. Hardegree	Atlanta, IV	2024
The Rev. Canon Juan I. Marquez	Dominican Republic, IX	2024
Ms. Christina Pacheco	South Dakota, VI	2024
The Rev. Dominique Piper	Los Angeles, VIII	2024
Ms. Elizabeth Rousseau	Connecticut, I	2024
The Rev. Michael Sells	Navajoland Area Mission, VIII	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024
Mr. Michael Glass, Representative of the President of the House of Deputies	San Joaquin, VIII	2024

Changes in Membership

Mathew Payne resigned in April 2023 from the Task Force.

Representation at General Convention

Deputy Paul Canady, Deputy Laura Curlin, Deputy Lindsey Hardegree, and Deputy Elizabeth Rousseau are authorized to receive non-substantive amendments to this Report at the General Convention

Acknowledgements

We wish to thank Brian Murray and the General Convention Office for their assistance in crafting the church-wide survey the Task Force initiated and in collecting the data.

Mandate

2022 - A156 Establishing a Task Force on the State of Membership in The Episcopal Church

That the 80th General Convention authorizes the creation of a task force to re-envision membership as defined in Canon I.17.1-4: Of Regulations Respecting the Laity and Canon 1.6.1: Of the Mode of Securing an Accurate view of the State of This Church; and be it further

Resolved, that the Presiding Bishop and President of the House of Deputies appoint the members of this task force to include at least 3 bishops, 5 clergy and 7 laypeople with appropriate representation from urban and rural congregations, congregations in which people of color are a majority, and congregations that represent the full geographic and economic diversity of the Episcopal Church, including at least one member from outside the United States of America; and be it further

Resolved, that the President of House Deputies is encouraged to include as an additional member one who has served on the most recent House of Deputies State of the Church Committee; and be it further

Resolved, that this task force work closely with the Task Force to Study Congregational Vitality Indicators (A132) and the House of Deputies State of the Church Committee; and be it further

Resolved, that the task force be charged with developing new and relevant membership definitions that reflect the experience, practices, and needs of congregations, including membership definitions that are:

- expansive and applicable to a wide range of cultural and regional contexts
- easy to ascertain and report in yearly parochial reports
- faithful to the distinct role and sacramental understanding of the baptized in the life of the church
- new and expansive, including those who are not yet baptized or whose baptisms are not recorded in an Episcopal church; and be it further;

Resolved, that the task force be charged with examining the impact that a changed understanding of membership would have on diocesan canons and congregational bylaws; and be it further

Resolved, that the task force reevaluate the present connection between confirmation and membership; and be it further

Resolved, that the task force issue a report to the 81st General Convention; and be it further

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

Summary of Work

The Task Force on the State of Membership in the Episcopal Church worked to engage the question of what membership in a church means in this era of Christianity. More specifically, we explored how The Episcopal Church counts its members, levels of membership in our branch of the Jesus Movement, and how we can improve our methods of counting our people. We looked at definitions of membership in the Evangelical Lutheran Church of America and the Presbyterian Church (USA) along with standards for membership in various Episcopal parishes and dioceses as they interpret the canons. We recognize that we have a broken and outdated way of counting our people where membership does not necessarily reflect active participation. We also recognize a “one-size fits all” solution is not possible as different methods are needed in different contexts of our Church.

Our work and mandate extended from the report of the House of Deputies State of the Church Committee to the 80th General Convention. As part of that work, we met with the Task Force on Vitality and the current HODSTOC subcommittee on the Parochial Report. We look forward to seeing how their work and our work will converge! We fully support their recommendation for increased collection of data to help us understand who we are as a church and how we can most effectively continue the spread of the Gospel. We also appreciate that these groups are working on solutions in other realms of membership and data collection.

The Task Force sought to engage others in the conversation about what it means to be a member of an Episcopal church through a church-wide survey. We went through Diocesan offices asking for Bishops or their designee to identify five or six parishes to “represent the broadest possible spectrum of parishes, missions, and worshipping communities in your Diocese.” All communication was translated into Spanish and French. We received names from 37 dioceses representing eight of our nine provinces. Unfortunately, we did not receive responses from dioceses or parishes outside the United States. A goal of the survey was also to evaluate the connection between “confirmation” and “membership” as well as peoples’ understandings of the defined levels of membership and the effectiveness of those definitions. We received 81 responses, and we express our gratitude for all those who took the time to answer. The data from this survey is available in the Supplementary Materials section of this report.

Our questions focused on the varying definitions and categories of “member” of The Episcopal Church. We aimed to learn what respondents’ understand about the differences and gauge their opinion on the importance of those differences. Additionally, we asked open-ended questions about what it means to be a member of a church, transferring membership, and the Parochial Report. We offer all of the responses, unedited, in the Supplementary Materials section.

Some observations from the survey:

- 61% of respondents said that the various categories of membership are only slightly or not at all important in carrying out ministry in their local setting.

- 54% of respondents said that varying degrees of membership are important.
- 77% of respondents said that they understood the differences in membership status.
- Baptism, Receiving Communion, and Contributions of Time, Talent, and Financial Resources were all Very or Extremely Important aspects of membership to those who responded.
- A strong desire exists for an online process for transferring membership from one parish to another.

The outcome of our conversations, collaboration with other interim bodies, and the results of our church-wide survey is that, with prayer and discernment, the Task Force proposes a change to Canon I.17 that we believe will provide clarity on what makes for a member of The Episcopal Church. The proposed shift in language specifically seeks to provide better understanding between the terms “communicant” and “communicant in good standing.” We maintain our long-held understanding that Baptism in the name of the Father and of the Son and of the Holy Spirit, in this or another tradition, is the entry point for membership into the church. (Canon I.17.1.a). The question of “communion without Baptism” was outside the scope of this Task Force, and therefore we offer no opinion on that subject.

The phrase “known to the treasurer” often gets used when speaking of a “communicant in good standing.” The Task Force wishes to point out that this phrase is not found in TEC Canons, though it might be in parish bylaws or diocesan canons. We hold up the flexible and broad phrase “giving for the spread of the kingdom” found in TEC Canons, which recognizes the many ways one could be helping to advance the Jesus Movement. We hope that this phrase will remain flexible in our practices.

Identified future needs and recommendations:

- An online dashboard with easier access to membership data.
 - Such a tool could help parishes see how they compare to their peers. It could also assist in establishing markers for parish and diocesan vitality, enhancing the ability of parishes and dioceses to assess where they are as they discern God’s call to them.
- Parochial Report that captures church plants, missional communities, campus ministries, schools, and other worshipping communities.
 - It’s difficult to capture the full scope of The Episcopal Church’s membership when we do not have the whole picture.
- Webinars at regular intervals on the status of membership in the Church.

Proposed Resolutions

A108 Proposal of Changes to Title I, Canon 17

Resolved, That Title I, Canon 17 be amended as follows:

<Amended text as it would appear if adopted and concurred. Scroll below the line of asterisks (***) to see the version showing all deleted and added text.>**

Canon 17: Of Regulations Respecting the Laity

Sec. 1 .

a. All persons who have received the Sacrament of Holy Baptism with water in the Name of the Father, and of the Son, and of the Holy Spirit, whether in this Church or in another Christian Church, and whose Baptisms have been duly recorded in this Church, are Members thereof.

b. Members sixteen years of age and older, or who have been confirmed or received, are to be considered Adult Members.

c. It is expected that all Adult Members of this Church, after appropriate instruction, will have made a mature public affirmation of their faith and commitment to the responsibilities of their Baptism and will have been confirmed or received by the laying on of hands by a Bishop of this Church or by a Bishop of a Church in full communion with this Church. Those who have previously made a mature public commitment in another Church may be received by the laying on of hands by a Bishop of this Church, rather than confirmed. This may be a requirement for specific leadership roles as defined by the Constitution and Canons of this Church and its constituent bodies.

d. Any person who is baptized in this Church as an adult and receives the laying on of hands by the Bishop at Baptism is to be considered, for the purpose of this and all other Canons, as both baptized and confirmed; also,

Any person who is baptized in this Church as an adult and at some time after the Baptism receives the laying on of hands by the Bishop in Reaffirmation of Baptismal Vows is to be considered, for the purpose of this and all other Canons, as both baptized and confirmed; also,

Any baptized person who received the laying on of hands at Confirmation (by any Bishop in historic succession) and is received into The Episcopal Church by a Bishop of this Church is to be considered, for the purpose of this and all other Canons, as both baptized and confirmed; and also,

Any baptized person who received the laying on of hands by a Bishop of this Church at Confirmation or Reception is to be considered, for the purpose of this and all other Canons, as both baptized and confirmed.

Sec. 2. All Members of this Church who for the previous year have been faithful in corporate worship, unless for good cause prevented, and have been faithful in working, praying, and giving for the spread of the Kingdom of God, are to be considered Communicants in Good Standing.

Sec. 3. A person who is active in the life of this Church through worship, giving, and program participation, but whose official membership remains elsewhere is to be considered an Associate Member. An associate member may serve in leadership at the discretion of their local canons and bylaws.

Sec. 4.

a. A Member of this Church shall procure a Letter of Transfer to transfer their Certificate of Membership from the congregation in which their membership is recorded to another Congregation. This Letter of Transfer shall indicate that the person is recorded as a Member of this Church and whether or not such a Member:

1. is recorded as being a Communicant in Good Standing;
2. has been confirmed or received by a Bishop of this Church or a Bishop in full communion with this Church.

Upon acknowledgment that a Member who has received such a Letter of Transfer has been enrolled in another congregation of this or another Church, the Member of the Clergy in charge or Warden issuing the Letter of Transfer shall remove the name of the person from the parish register.

b. The Member of the Clergy in charge or Warden of the congregation to which such membership is surrendered shall record in the parish register the information contained on the presented Letter of Transfer, and then notify the Member of the Clergy in charge or Warden of the congregation which issued the certificate that the person has been duly recorded as a Member of the new congregation. At that time the person's removal shall be noted in the parish register of the congregation which issued the Letter of Transfer.

c. If a Member of this Church, not having such Letter of Transfer, desires to become a Member of a new congregation, that person shall be directed by the Member of the Clergy in charge of the said congregation to procure a Letter of Transfer from the former congregation, although on failure to produce such Letter of Transfer through no fault of the person applying, appropriate entry may be made in the parish register upon the evidence of membership status sufficient in the judgment of the Member of the Clergy in charge or Warden.

d. Any communicant of any Church in full communion with this Church shall be entitled to the benefit of this section so far as the same can be made applicable.

<Proposed amended resolution text showing exact changes being made:>

Canon 17: Of Regulations Respecting the Laity

Sec. 1.

a. All persons who have received the Sacrament of Holy Baptism with water in the Name of the Father, and of the Son, and of the Holy Spirit, whether in this Church or in another Christian Church, and whose Baptisms have been duly recorded in this Church, are ~~members~~ *Members* thereof.

b. Members sixteen years of age and ~~over~~ *older*, or who have been confirmed or received, are to be considered ~~adult members~~ *Adult Members*.

c. It is expected that all ~~adult members~~ *Adult Members* of this Church, after appropriate instruction, will have made a mature public affirmation of their faith and commitment to the responsibilities of their Baptism and will have been confirmed or received by the laying on of hands by a Bishop of this Church or by a Bishop of a Church in full communion with this Church. Those who have previously made a mature public commitment in another Church may be received by the laying on of hands by a Bishop of this Church, rather than confirmed. *This may be a requirement for specific leadership roles as defined by the Constitution and Canons of this Church and its constituent bodies.*

d. Any person who is baptized in this Church as an adult and receives the laying on of hands by the Bishop at Baptism is to be considered, for the purpose of this and all other Canons, as both baptized and confirmed; also,

Any person who is baptized in this Church as an adult and at some time after the Baptism receives the laying on of hands by the Bishop in Reaffirmation of Baptismal Vows is to be considered, for the purpose of this and all other Canons, as both baptized and confirmed; also,

Any baptized person who received the laying on of hands at Confirmation (by any Bishop in historic succession) and is received into The Episcopal Church by a Bishop of this Church is to be considered, for the purpose of this and all other Canons, as both baptized and confirmed; and also,

Any baptized person who received the laying on of hands by a Bishop of this Church at Confirmation or Reception is to be considered, for the purpose of this and all other Canons, as both baptized and confirmed.

Sec. 2.

~~a. All members of this Church who have received Holy Communion in this Church at least three times during the preceding year are to be considered communicants of this Church.~~

~~b. For the purposes of statistical consistency throughout the Church, communicants sixteen years of age and over are to be considered adult communicants.~~

~~Sec. 3.~~ **Sec. 2.** All ~~communicants~~ Members of this Church who for the previous year have been faithful in corporate worship, unless for good cause prevented, and have been faithful in working, praying, and giving for the spread of the Kingdom of God, are to be considered ~~communicants in good standing~~ *Communicants in Good Standing*.

Sec. 3. A person who is active in the life of this Church through worship, giving, and program participation, but whose official membership remains elsewhere is to be considered an Associate Member. An associate member may serve in leadership at the discretion of their local canons and bylaws.

Sec. 4.

a. A ~~member~~ Member of this Church ~~removing from the congregation in which that person's membership is recorded~~ shall procure a Letter of Transfer to transfer their Certificate of Membership from the congregation in which their membership is recorded to another Congregation. ~~certificate of membership~~ This Letter of Transfer shall indicate ~~indicating~~ that that the person is recorded as a ~~member (or adult member)~~ Member of this Church and whether or not such a ~~member~~ Member:

~~1. is a communicant;~~

~~1. 2.~~ is recorded as being ~~in good standing~~ a Communicant in Good Standing;

~~2. 3.~~ has been confirmed or received by a Bishop of this Church or a Bishop in full communion with this Church.

Upon acknowledgment that a ~~member~~ Member who has received such a ~~certificate~~ Letter of Transfer has been enrolled in another congregation of this or another Church, the Member of the Clergy in charge or Warden issuing the ~~certificate~~ Letter of Transfer shall remove the name of the person from the parish register.

b. The Member of the Clergy in charge or Warden of the congregation to which such ~~certificate~~ membership is surrendered shall record in the parish register the information contained on the presented ~~certificate of membership~~ Letter of Transfer, and then notify the Member of the Clergy in charge or Warden of the congregation which issued the certificate that the person has been duly recorded as a ~~member~~ Member of the new congregation. ~~Whereupon~~ At that time the

person's removal shall be noted in the parish register of the congregation which issued the ~~certificate~~ *Letter of Transfer*.

c. If a ~~member~~ Member of this Church, not having such a ~~certificate~~ *Letter of Transfer*, desires to become a ~~member~~ Member of a new congregation in the place to which he or she has removed, that person shall be directed by the Member of the Clergy in charge of the said congregation to procure a *Letter of Transfer* ~~certificate~~ from the former congregation, although on failure to produce such *Letter of Transfer* ~~certificate~~ through no fault of the person applying, appropriate entry may be made in the parish register upon the evidence of membership status sufficient in the judgment of the Member of the Clergy in charge or Warden.

d. Any communicant of any Church in full communion with this Church shall be entitled to the benefit of this section so far as the same can be made applicable.

EXPLANATION

The goal of the Task Force is to simplify the canon regarding membership in The Episcopal Church.

The Task Force proposes a new level of membership called Associate Member. This is built upon models in The Presbyterian Church (USA) and is currently used in some Episcopal parishes. Associate Member acknowledges there are people that would consider themselves members that don't fit "Member" or "Communicant in Good Standing." This proposed change would allow dioceses to have additional membership categories as needed.

The Task Force proposes amending our understanding of a Communicant in Good Standing to remove the reference to receiving Communion three times in the preceding year. We maintain in Sec 3 that being active in public worship, unless unable for reason, fulfills the intent, which is to ensure a Member is a part of the life of the parish. We recognize that some parishes struggle to find adequate clergy coverage to provide Communion on even a semi-regular basis. There are active and faithful members of those parishes for whom the "three communions a year" canon would be a hinderance.

The Task Force proposes cleaning up the language of "Certificate of Membership" to the more common "Letter of Transfer."

The Task Force offers clarified language that the sacramental rite of Confirmation is not a requirement for membership, but may be a requirement for certain leadership positions in parishes, dioceses, and The Episcopal Church. This change also recognizes the maturity of the rite of Confirmation, and would allow for Members under the age of 16, who have made the adult commitment of Confirmation, to be considered Adult Members.

Implications for changing definitions of membership

These proposed changes uphold all but one of the current membership categories while recognizing the diversity of diocesan requirements for leadership and the importance of local context. The Task Force also recognizes and affirms that Confirmation as a requirement for membership remains at the discretion of each diocese. Regardless of what happens with these proposed changes, we encourage dioceses and parishes to work towards ensuring their canons and bylaws align with Canon I.17.

As the Rev. Carlos de la Torre wrote in a report for the State of the Church Committee after the 80th General Convention:

While it can be argued that the canons offer some wiggle-room for some of these situations, these situations are no longer a rare exception to the norm. Changes in church and culture, especially in a post-pandemic world, requires us to think creatively on what it means to be a present and future, active and engaged, member of The Episcopal Church. The Church should not simply change our present definitions and understandings of membership because the world around us is changing, but because the Church should be constantly evolving.

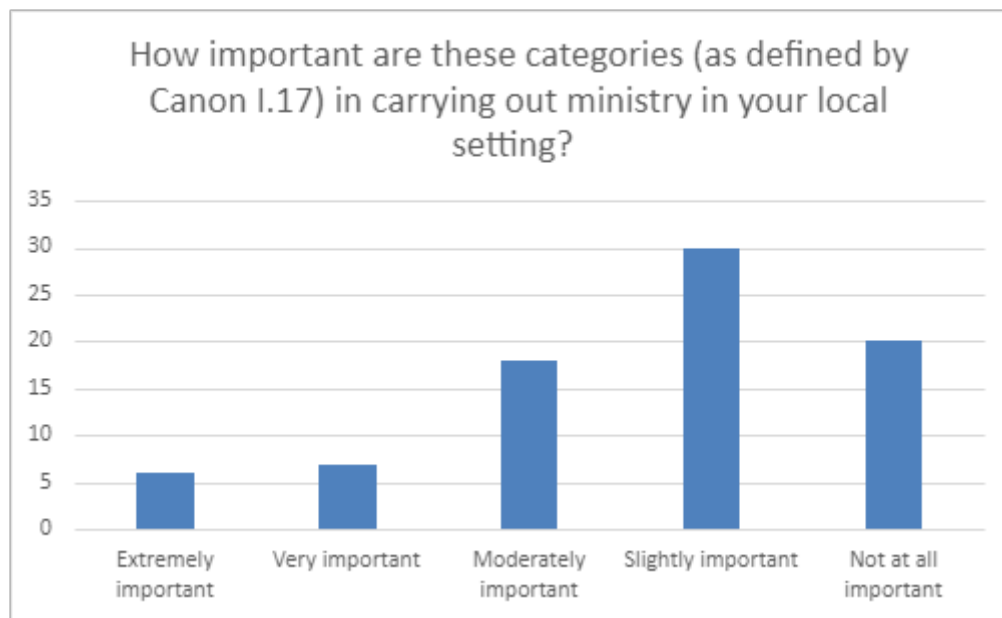
Supplementary Materials

2023 Survey by the Task Force on the State of Membership in the Episcopal Church

In The Episcopal Church, we currently have multiple categories of membership defined by [Canon I.17](#):

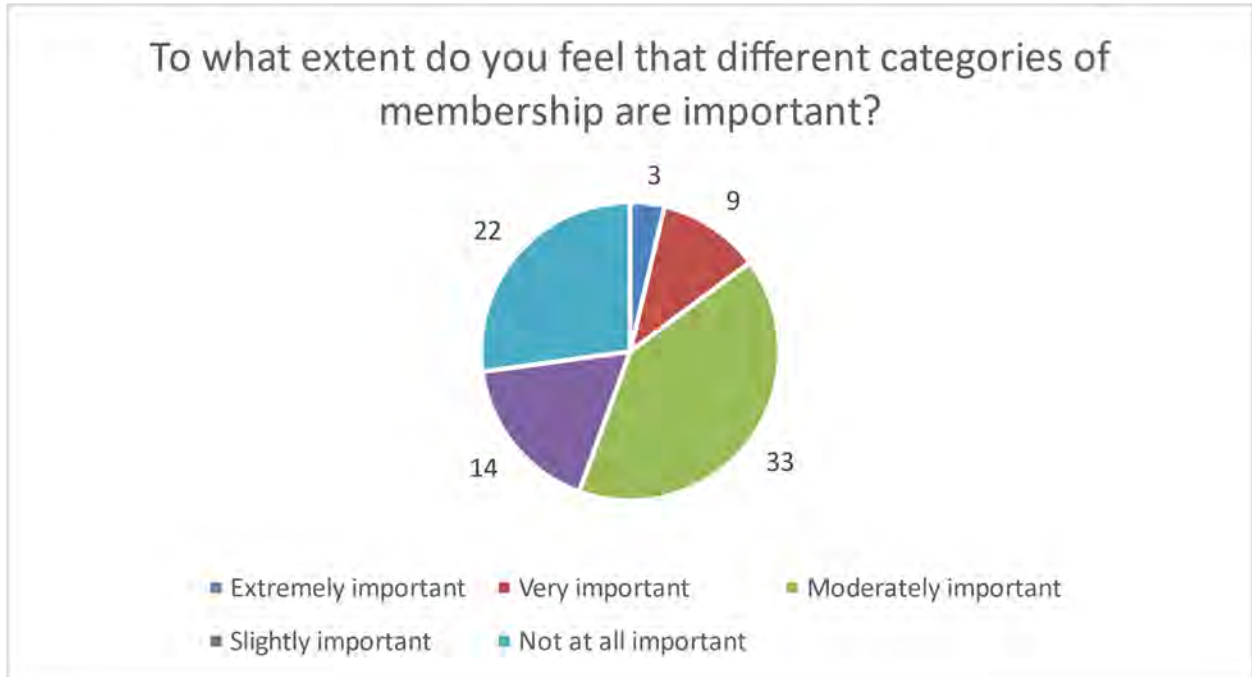
- Baptized members,
- Adult Baptized members,
- Communicants,
- Adult Communicants, and
- Communicants in Good Standing

As a leader in a worshipping community, how important are these categories (as defined in defined by [Canon I.17](#)) in carrying out ministry in your local setting?



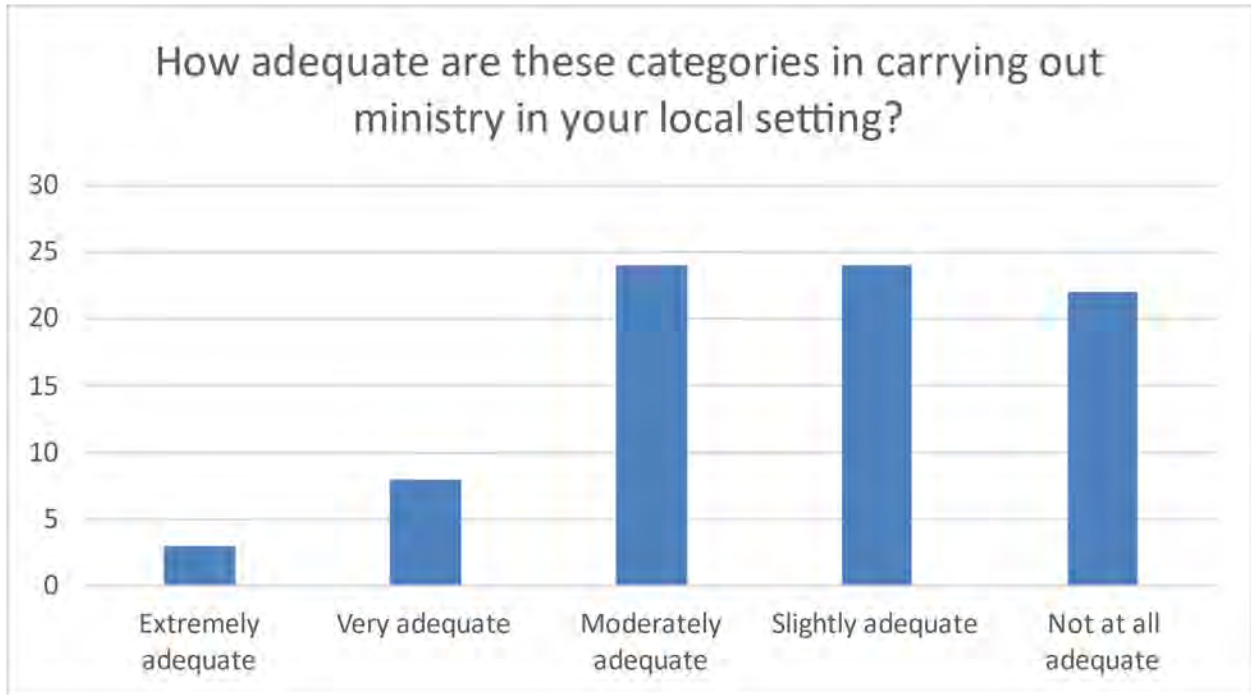
Extremely important	7.41%
Very important	8.64%
Moderately important	22.22%
Slightly important	37.04%
Not at all important	24.69%

To what extent do you feel that different categories of membership are important?



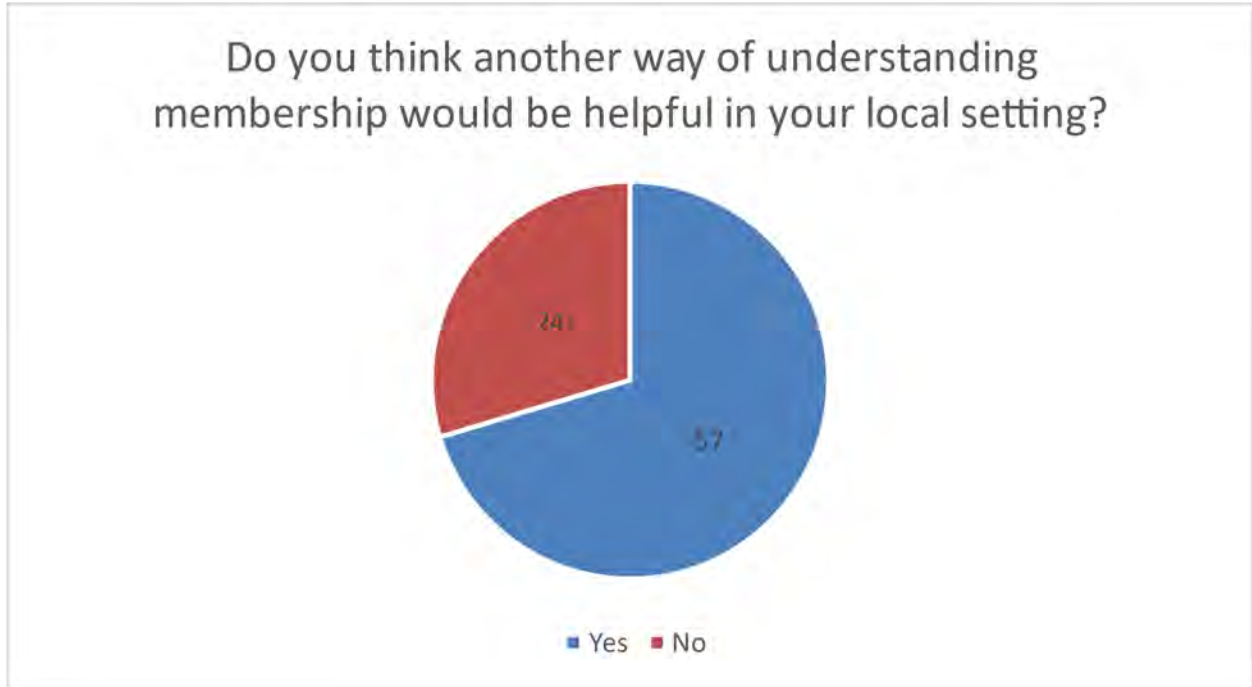
Extremely important	3.70%
Very important	11.11%
Moderately important	40.74%
Slightly important	17.28%
Not at all important	27.16%

How adequate are these categories in carrying out ministry in your local setting?



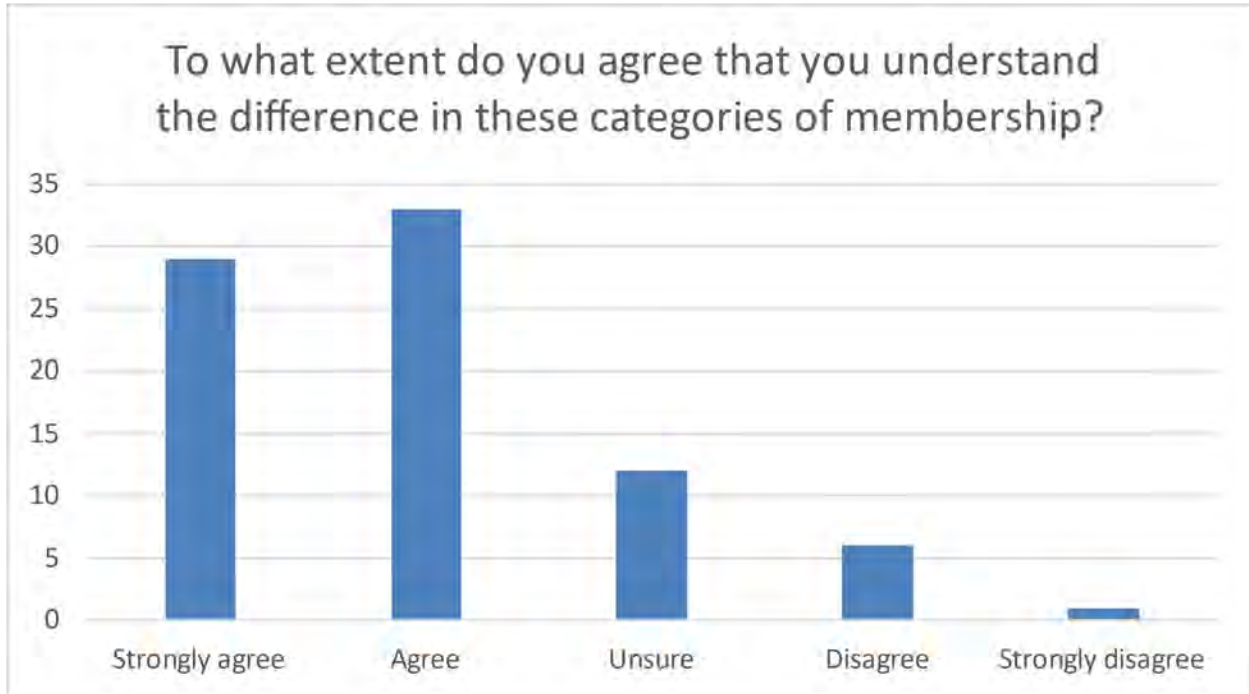
Extremely adequate	3.7%
Very adequate	9.7%
Moderately adequate	28.4%
Somewhat adequate	29.8%
Not at all adequate	28.4%

Would another way of understanding membership be helpful in your local setting?



Yes 70.3%
No 29.6%

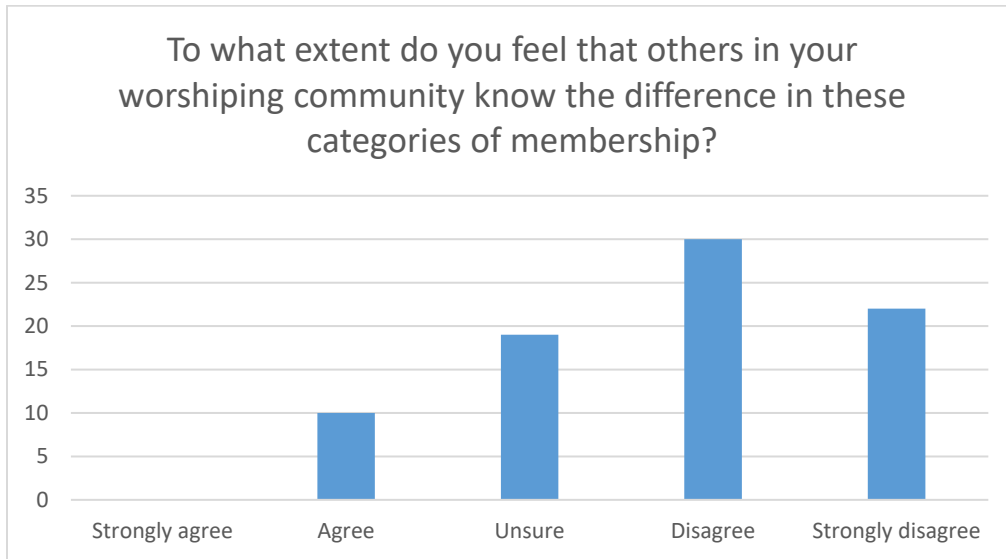
To what extent do you agree that you understand the difference in these categories of membership?



Strongly agree 37%
Agree 40.7%
Disagree 7.4%
Unsure 14.8%

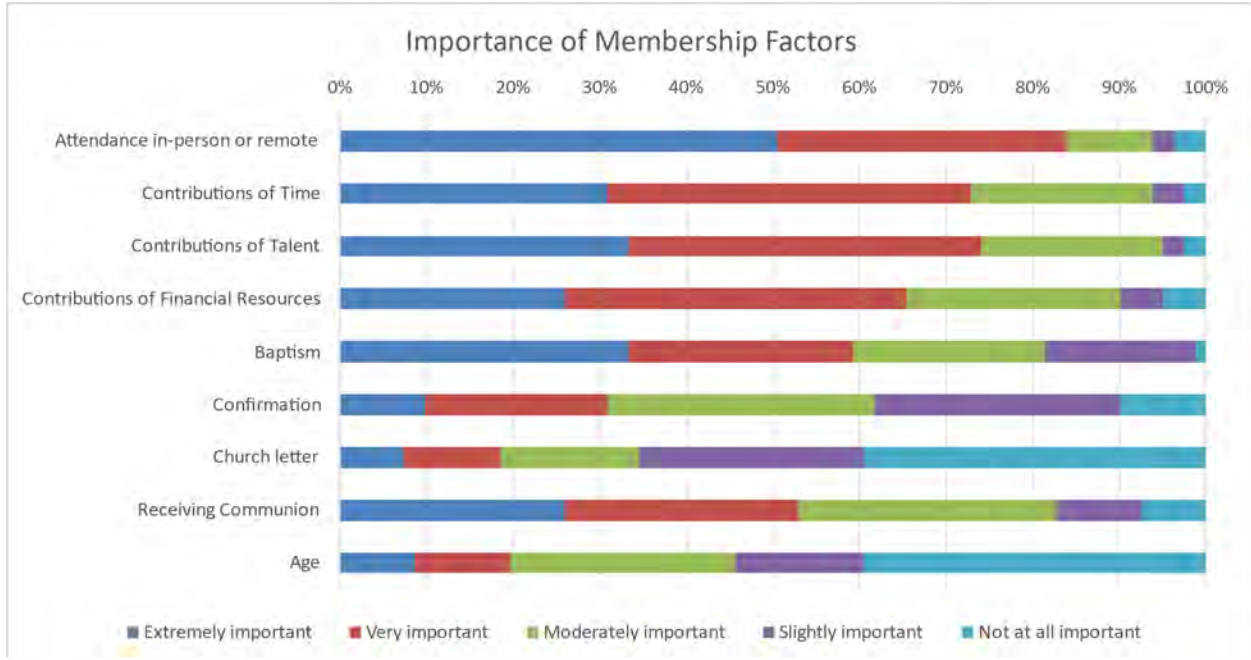
To what extent do you feel that different categories of membership are important?

Extremely important	3.70%
Very important	11.11%
Moderately important	42.0%
Slightly important	18.5%
Not at all important	27.1%



How important are the following factors to membership categories?

• Attendance (in-person or remote)		• Baptism	
Extremely important	50.62%	Extremely important	33.33%
Very important	33.33%	Very important	25.93%
Moderately important	9.88%	Moderately important	22.22%
Slightly important	2.47%	Slightly important	17.28%
Not at all important	3.70%	Not at all important	1.23%
• Contributions of Time		• Confirmation	
Extremely important	30.86%	Extremely important	9.88%
Very important	41.98%	Very important	20.99%
Moderately important	20.99%	Moderately important	30.86%
Slightly important	3.70%	Slightly important	28.40%
Not at all important	2.47%	Not at all important	9.88%
• Contributions of Talent		• Church letter	
Extremely important	33.33%	Extremely important	7.41%
Very important	40.74%	Very important	11.11%
Moderately important	20.99%	Moderately important	16.05%
Slightly important	2.47%	Slightly important	25.93%
Not at all important	2.47%	Not at all important	39.51%
• Contributions of Financial Resources		• Receiving Communion	
Extremely important	25.93%	Extremely important	25.93%
Very important	39.51%	Very important	27.16%
Moderately important	24.69%	Moderately important	29.63%
Slightly important	4.94%	Slightly important	9.88%
Not at all important	4.94%	Not at all important	7.41%
		• Age	
		Extremely important	8.64%
		Very important	11.11%
		Moderately important	25.93%
		Slightly important	14.81%
		Not at all important	39.51%



Is there something else that is important, but that we have not included?

- It has been helpful for me to take into consideration how committed someone is to the church when they weigh in on the way "things should be." If they are not attending, their opinion carries less weight. If they are not giving time, talent or tithe, their opinion carries less weight. If they are not committed, I am less likely to ask them to consider a leadership position because they have no skin in the game.
- Prayer
- Change age to 18; perhaps a category for affiliated persons (baptized but irregular attenders, not all that active). Keep a category on parochial report for active non-baptized (Kids and other new people who are not yet members).
- Although there were remote forms of worship prior to the greater pandemic, COVID-tide obviously increased and enhanced those forms of worship as well as heightened the number of virtual programming options overall. There may need to be a consideration of how attendance is evaluated (does being on screen for part of a service "count"; are online views used to determine attendance?). Obviously, there is always a tension between attending and contributing that leads into a discussion of active versus passive membership, but the added ways for remote participation may, in fact, open that debate further.
- The desire to spend time in the Word and willingness to commit to lifelong learning.
- If we keep the categories from Canon I.17, I would create space for non-Baptized members as an example.
- Baptism, Confirmation, Reception, and Receiving Communion are all very important, but not when we are talking about membership.
- Attendance can be at church gatherings/outreach outside of Sunday worship. In other words, we have several active members who do not attend Sundays for various reasons.
- I guess I wonder what you're assuming "Attendance" (in the table) is at. Sunday morning worship? Worship, period? Worship feels central to me, but when we had a Thursday evening service for a while, we had a few folks who were Thursday people and definitely not Sunday people. We've also had folks who'll participate in outreach, or care for the grounds, but don't really show up for church much. That's complicated in its own way, but if those folks think of themselves as members and participate in the life of the parish, do we count them even if their worship attendance per se is low or nonexistent?
- NA
- There are people who contribute financially and who never attend. Perhaps this is a category that could be included.
- No

- NOTE: Could not figure out how "Age" is particularly important to Membership categories (except for "Children" vs. "Adults," so cannot answer that last line. Participation in local parish ministries/leadership is important. Some level of reasonable understanding of the Episcopal Articles of Religion would also seem important.
- Our parish is pretty small (about 15-20 people) and we have many that attend and donate time and money but have never been officially welcomed into the church. We count people for the record using these categories once a year, but otherwise don't pay much attention to them.
- Attendance should be in-person, remote is interesting but hard to accurately gauge.
- My choices in the above categories reflect what I believe should be true, not what actually is. For example: I rated baptism, confirmation as being "not at all important" to the categories -- but currently, they are critical. Even so, to me, regular attendees who do ministry are far more important than "members" who rarely show up or participate in anything.
- whether they consider themselves members
- These categories are very important.
- The status of retired clergy is never factored, and people who are seasonal are also not factored.
- Cultural background or Ethnicity
- "Passion for doing God's work" Ongoing assessment of individual's gifts for ministry and opportunities provided to exercise them.
- My contributors added Belief in the Trinity, How we treat each others.
- We are conflicted about how to incorporate Baptism and Communion into the definition of membership, simply because we don't ask that question at Annual Parish Meetings, e.g., nor is anyone monitoring who does/does not take Communion.
- A discussion should be held on the difference between Confirmation for one who was baptized as an Episcopalian as opposed to someone raised in another denomination that was never previously Confirmed. A similar question arises around Reception. For the baptized Episcopalian it may well be the case that Confirmation represents a less significant change than one who is being Confirmed or Received from outside of the Episcopal Church We oppose the practice of tying levels of membership to one's ability to make financial contributions on the grounds of excluding those who do not have the financial means to do so. They should be seen, treated, and categorized as the same kind of member as anyone else. Put differently, the widow living off of social security that attends weekly should not be seen as less of a member than the businessman that attends three times a year and pledges a pittance. Similarly, we also oppose the categorization of "communicants." One's membership as a part of the church should not depend on their spiritual state that defines whether or not they are prepared to receive communion. Put differently, a faithful attender that does not feel comfortable

receiving communion because of a deep conviction about some aspect of their spiritual life should not be penalized for taking the weight of communion seriously. Given what we have to say about inclusion, we feel there is a moral imperative that being "in the club" should not affect how we welcome people into our community, be that on Sunday mornings or in deeper incorporation into the life of parish ministry. It is notable that, while we claim "In Christ there is no East or West," in practice TEC has drawn unnecessarily hard lines defining gradations of membership. Generally speaking, there is not a clear understanding of the designations themselves nor what makes them necessary. There was a time in living memory when one's membership in a church was known in the community. Additionally, that membership identified parishioners as certain kind of people (erroneously or accurately). Not only that, but that membership often reflected what status a parishioner held in that community. There's the old saying that "Blue-collar workers were Baptists; Managers were Methodists; and Business owners, doctors, and lawyers were Episcopalians." Mercifully, this is less the case today, but a system that ties one's church membership to one's economic class needs to be deeply reimagined. Other than tracking statistics, we are not aware of any programs at the greater Episcopal Church or Diocesan levels that rely on the data put forward by the Parochial Report. Yes, the report is published every year, but what purpose does it serve? What ministries does it enable? Does it help TEC or Dioceses hone in on communities that need particular help? With all of that said, there are some aspects of membership that are important. We do not wish to see the historical and genealogical value of the Parish Registers go away. They are immense treasures (and also just plain cool). We also deeply value the theological claim that baptism is "full initiation ... into Christ's Body the Church." Baptism is our primary means of establishing membership, but the current categories are in contradiction with the above theological statement from our Book of Common Prayer. If baptism is "full initiation," then how can we have further designations? In the instance of a member pursuing ordination, we do think it is important for there to be an indication of that person's commitment to the church beyond simple membership. Does this person actually attend a church? Do they contribute to the ministries of the church in whatever ways they are able? Have they been confirmed? While we do think this information is relevant and important to verify, it seems this information could be provided through a simple checklist with their parish leadership that would not require convoluted record keeping otherwise. There are three additional considerations we ask you to consider. First, we have been approaching online attendance largely as a means of being very much the part of the gathered body. Will the individuals who only attend virtually be considered eligible for church membership, and if so, will their membership carry an asterisk? Second, we have one parishioner who attends five churches in a rotation, effectively attending our church once per month. By all indications, they would qualify as an Adult Communicant in Good Standing, except that their baptism is not recorded in our register. Could they be a member with our congregation and also a member of all four other churches and denominations? Finally, we have a surprisingly large number of people in our congregation that have been attending for decades that are not members by the current designations. Some are so involved as to be major contributors to the personality of

the parish, defining for decades many aspects of our community life. Could there be a way to include these stalwarts in our membership?

- If you mean official membership then these categories matter, but seekers, who are not yet officially members are in our minds members of this community.
- Online participation should count as full participation
- When considering the importance of member contribution of time, talent, and financial resources, each member's circumstances need to be considered. Some have physical limitations that prevent personal participation but who give of their treasure, while other have very limited financial resources but give of their time and talents. Age is important so those 16 and older can vote at Annual Meetings and serve of vestry.
- Whether or not somebody wants to be included in the church directory.
- Willingness to be involved, willingness to serve and give

Given that the notion of church membership differs by culture and region, how is membership unique in your context?

- Our city is a transient community, so we get folks from all over the country, with differing backgrounds. They are often not seeking an Episcopal church so much as a Christian church that mirrors their values and is welcoming. Our convoluted definitions of membership are not often discussed, but when they are (annual meeting for example), they become barriers and make some folks feel "less than".
- We are a small, mutual ministry, rural congregation. The COVID era took us into the world of technology, and now we have regular attendees from a broad population - former members who had moved away, and can now attend virtually; friends of members who attend virtually; people whose baptism and confirmation status is unknown, etc. I doubt that this is unique.
- Simply, membership is considered attendance, financial support, and having one's baptismal date recorded with the church office. We still make an attempt to put that information in ink in "the book".
- There are several Episcopal churches in the community I serve. Members have drifted among them depending on the priest, the worship time, programs offered, etc. This creates a lack of loyalty in church membership.
- N/A
- We are made up of mostly conservative, elderly white members.
- I'm only concerned with membership, insofar as it affects eligibility for vestry nomination. Otherwise it's irrelevant.

- People have little sense of denomination and we get very few formal transfer requests in or out.
- There are some who were once active but are not now, yet send a donation each year and we count them as members, but not active members.
- People are eager to 'join' the church if they are active, but less likely to be received or confirmed. If someone Joins the church they go into the ledger as baptized members. Hopefully they remain active.
- Membership signifies someones' commitment to the community.
- We are traditional church so we see going to church and involvement in prayer and ministry as nonnegotiable for active members
- Others come to receive and they are welcome
- Done want a place to get married or buried
- I don't think church membership is unique in my context. Persons coming from other Christian denominations want to know how they become members of the church and the process is pretty straight forward. If you feel called to follow Christ, you get baptized. If you want to participate in parish leadership, you need to be confirmed or received by the bishop.
- For persons coming from non-Christian traditions or from no faith. They want to learn about the faith and often want to know "what they need to do." I find this means we are talking more about how do I live as a Christian more than how do I become a member of the church. However, this still leads to baptism and when there is a discernment to become a leader, confirmation.
- We have a lot of new people and also a lot of evangelical converts. Some wait until their kids are 4-10 for baptism. So we have about 60-80 people throughout the year who are active but not yet baptized. Some get baptized and others turn in a membership form and are converted to members, others end up leaving the church because it isn't for them after all.
- So throughout the year, I mostly keep track of active attendees, then active members within that. I tend to keep our roles tight - if I haven't seen someone in a year and they are not responsive to me or others from the church who reach out, I deactivate them.
- We live in a community of about 35 thousand, mutable churches in the community. We have a moderate amount of diversity in the community. 80% are white and 8% other.
- All members are Baptized, confirmed or received
- In terms of labels and completing the annual parochial report, our parish follows the definitions outlined by the national church, and, as such, membership is not unique for us. Our membership (using those established labels) is part of our church family regardless of the specific labels they hold. We are a rural parish with multiple generations of some families

leading us, as well as some people new both to the area and to the Episcopal Church. Being accepted into the church family and being active tends to come down to the individual, rather than have their status affected by a perception of their membership category.

- It is not important in our context. What matters is who shows up and who gets involved. No one is ever turned away by our parish if they request sacramental or spiritual help. Categories of membership are not considered.
- Small rural church in a relatively small rural area. Making the Episcopal Church known in area is very important.
- We have very few young people in our parish. On any given Sunday the people in the pews are mostly, if not all, elderly.
- We tend to talk about those who are members of the parish community, (committed to making the parish their community of faith) and those who are members of both the parish and the Episcopal Church (by confirmation or reception).
- We have a number of people active in the life of our parish who are not baptized and have expressed clearly their desire never to be baptized. So they pledge and participate fully except are not able to serve on the Vestry or vote in parish elections. Some receive Communion regularly, which bothers me (the rector), whereas other non-Baptized "members" don't receive Communion, which is at least consistent with their personal beliefs that don't place importance on sacraments. Our newcomers identify strongly with the desire to be a member of the parish. Less important to most of them is the desire to be confirmed or received by the bishop.
- We are made up of mostly non-Episcopalians, refugees from other denominations or other kinds of traditions. Once they feel like they are part of the ministry, then they are members. We don't draw strong lines.
- I live in an unchurched society. I don't necessarily think it is unique anymore, but it is certainly a place where you have to explain why you attend church as opposed to needing to explain why you don't. But this is attendance, not membership. I just want people to show up.
- We have members who come from a variety of other religious communities, as well as a number who were raised outside of any church community. Our sense of membership is grounded in presence and involvement. We focus on making sure that people feel welcome, accepted and included.
- We have some members who work on Sundays but this goes beyond culture and region and is more about their types of jobs (doctors on call, sports related jobs that require travel, etc.) so we look beyond Sundays when we are considering who is active.
- Our immediate neighborhood is largely unchurched, so we find more members become that by declaration than by transferring a letter from another church.

- I am currently serving in a small rural area of Louisiana. I believe that if a person is part of the family unit then they are considered a member of the church. Once the family member is in the church then it becomes important for the formal process of letter transfer, baptism or confirmation. Although baptism, confirmation, communion and letter of transfer are important for this community.
- As I already mentioned, we have an active and continuing Zoom congregation, for whom "communicant" becomes a challenging category. These are committed, pledging members who attend worship weekly, but receive communion irregularly. I am comfortable fudging the matter and calling these folks communicants in good standing; I just want to flag that tying membership status to sacramental participation gets complicated in an era where online worship participation is a real and viable option.
- Another aspect in our context is that we have many newer members who come from evangelical or unchurched backgrounds. In my experience the "letter of transfer" routine is all but irrelevant in parish life today. But a formal membership process is time-intensive for folks with young kids - a significant growth area for our parish - and may be intimidating or offputting for people with church trauma in their past. We tend to handle membership very lightly - if you're participating regularly and think of yourself as a member, you're a member! - and that seems to work well with the folks joining the parish. I think denominational identity and formally "opting in" as an Episcopalian feels odd and unnecessary to some of these younger folks, as well. We're the right church for them right now, but if they move, they may not look for an Episcopal church.
- Membership is a rather fluid concept. In our urban setting we draw people who are cradle-Episcopalians, those who've found their way here from other traditions, those who looking for a bit of shelter or a bite of food-and may see sharing in our worship as part of the "price of admission." From the settled to the seeker, we see, receive, and care for them all
- Our membership consists of 55 and older folks - white - no children.
- Sometimes people think they are a member because they went to our preschool. The current categories allow good clarity for relating who is actually a member.
- Our church is located in a small town in Wisconsin and the church endured an extensive fire in 2008. The church registry was lost. As the parish priest, I don't track pre-2008 baptisms and confirmations. Membership is based upon participation and financial contributions.
- Membership in southwest Louisiana is not seen as regional. We try to emphasize and teach our global membership as opposed to congregational membership.
- Having lived in Mexico City, the Mid-Atlantic, the South and, now, the Northwest, I do not feel that membership in any of these places is particularly unique. Some in Montana feel that people's sense of historic connection to their birth-church is unique, but I have found this to be true in most places.

- We have a large number of homeless persons who participate regularly in worship and take advantage of services we offer, both on our own and in partnership with others.
- We are located in a low populated area. Many travel a long way (from 20-40 minutes) to come to church.
- Like most regions, we have few "cradle" members of TEC, and the adult enquirers represent the full spectrum of beliefs and practices. We "incorporate" them by involving them in the work of the parish -- food kitchen, Toys for Tots, community dinners; we invite them also to participate in worship as readers, ushers, etc.
- But the idea of "full membership" is not in their vocabulary, and I don't push it.
- We are in a university community and some of our faculty and students return to their permanent homes for the summer. We also almost closed our doors during the pandemic and are slowly returning. Except for a few people, everyone grew up in another denomination (mostly Catholic, Lutheran, Presbyterian, non-denominational evangelical). They have come to our church because we are the only church in town that is supportive of LGBTQ people.
- We have people coming from multiple denominations and some unchurched or disaffiliated. The notion of membership is less important to folks than it used to be. They tend to "affiliate" with us by attending, participating, etc. Until they become interested in the more formal leadership positions such as vestry, and ordination, membership is rarely a concern for any of us. Since, for the most part, the table or worship is open to any and all, it seems strange to suddenly throw up boundaries around certain offices. That isn't to say we don't need those boundaries, it just doesn't fit with the everyday.
- Most of the folks who join the church are either non-Christian or from evangelical backgrounds where membership is defined as attending.
- Membership in our context is often thought of as "fulfilling an expected duty." Parents will have their children baptized, because it's what you are supposed to do. You can tell them, teach them that it supposed to be the start of a lifelong commitment to follow Jesus -- and yet, many see it as a photo opportunity or as "hellfire insurance." There are some people who have no current connection with a church. They ask to have their children or grandchildren baptized. If you allow it, the baptism is the last time you'll ever see them until it's time for their funeral service. They never come back, because they have gotten what they wanted from the church, but aren't willing to give anything back.
- I serve two contexts. The primary one is a typical Anglo congregation where the categories of membership are reasonably relevant. The second is a Lakota cultural context. In that setting much of church involvement revolves around funerals, baptisms, Easter, and Christmas. The regular categories of membership are less meaningful and less helpful in that context.
- We have snowbirds who leave us in the winter, and our attendance also dips in the summer.
- In the traditional sense defined by the canons of the church.

- Our community is transient, so any perceived barriers to membership (baptism and/or providing documentation of it, confirmation, not being Catholic anymore) makes people back off right away. They want membership now and to figure out the sacramental aspects later.
- Membership in my context has a lot to do with families. Like, not all persons in a family might be at church on a Sunday - or maybe even ever come to church - but if it's Grandma's church then that's where all the kids and grandkids are going to be on Christmas and Easter and maybe Mother's Day. I think that's important to recognize, because it is the church for that family.
- The membership is totally Hispanic, from different countries, and also children of Hispanics born in the United States, most of them are bilingual.
- We have remote viewers. around the country. Some donate, most do not. We have people who won't pledge, but give generously and regularly.
- This isn't different than other places I've been.
- A large percentage of those in our parish are from other Christian traditions.
- We have a lot of people who do not ever make the transition into formal membership, but who participate on a regular or irregular basis. A lot of people think of us as their church even though we don't know much about them! We are in New England and people are very hesitant to make a formal religious claim about themselves.
- Lots of cowboys who aren't really aware that the sociology of the culture which leans more toward an individualistic interpretation of God is by nature more Protestant than Catholic.
- Because Nevada is a huge and empty state, congregationalism is an unquestioned norm.
- Our context includes members who voice concern during annual meetings regarding whether all whose votes are counted are officially members of the church and communicants in good standing.
- We are in a rural area that is seasonal. We have people who are members of other churches elsewhere, and are only here half a year or so. We have people who have membership in other churches in order to be buried there. The average Sunday attendance is really the important number for us.
- Our Membership is Majority Filipino.
- Our regularly attending members are made up of mostly older, white, congregants. We also have a few young families who do not attend regularly, but attend Christmas, Easter, and other special days.
- We have summer people who are here 5-6 months a year and are very active in this congregation, but also active in their winter congregations. We may not have their "letter" but we count them as members. Formal membership is not a major concern—we are focused on

hospitality, making room for all who want to be here, whether they come once a month, once a week, or three times a week.

- We have Native American population in this area, which helps cause an attitude of unimportance of membership categories.
- This area is largely Roman Catholic and Lutheran. Many are not familiar with the Episcopal Church.
- We are a minority in our area. Many opportunities to explain what confirmation is.
- In our context, our membership consists of predominantly elderly African Americans.
- We are unique in that much of our new membership comes from different denominational backgrounds. Many newcomers come to St. John's for social justice ministries, rather than because of an interest per se in the Episcopal Church. We haven't imposed requirements around confirmation, transfer of letter, etc.
- Membership is not unique in our context.
- It is not as important as being involved in our parish and community work and being a regular attendee.
- We put everyone to work no matter the age.
- Many of our younger members (in my opinion, correctly) believe they are members because they attend. They don't understand why there are differing levels, so to speak, of membership.
- We are a college parish and have students who come through regularly. They would qualify for membership in our parish but they are sometimes members of their home parishes (or internship parishes, etc.) Having some kind of designation that takes this into account would be helpful. We also have a number of retired clergy who are technically not members by virtue of their ordination, but who meet membership requirements according to our bylaws.
- Because we are in a college community, we see a lot of turnover. Some people arrive and are very committed for the duration of their time here (sometimes only a year, sometimes four or five). Some are far more involved than those that can technically claim membership.
- Additionally, our town (and congregation) skew older but we have very few resources for housing the elderly. As a result, many people tend to move away rather than age in place. Because of that, we do comparatively few funerals. Put differently (and maybe crassly), it is a simpler process to remove someone from our register because of death than it is to remove someone who has moved away for their final years.
- We don't think it is unique.
- We have a lot of "snowbirds" -- members who live here in the winter and have a home elsewhere in the summer. In some cases, many of them are members of two parishes.

- We have substantial groups of people who consider themselves members of our congregation who are not reflected in these categories (baptism not recorded, rare attendance, connected through our meal or garden ministries, consider themselves members or two congregations, attend only virtually and do not wish to receive communion). In eleven years of ordained ministry, I've seen letters of transfer used three times.
- The Episcopal church in my community closed in 2002 and our church plant began in 2019, which means that two generations were mostly never baptized or confirmed. Full membership and access to communion regardless of baptism has been important in rebuilding trust and shared identity as the body of Christ.
- Parishioners come to our community because of its welcome and inclusion of all people in the family of God. Belonging to the community has to do with being welcomed, with connecting with the people and the message/values of the community. The mark of membership at our congregation, then, has to do with people's sense of belonging with each other and the community. Additionally, while most people feel belonging to our parish community in connection to worship services, a significant portion also find belonging in their involvement in our ministries, especially through volunteering in the resale shop, the food pantry, or the community garden. Some who are part of these ministries might consider themselves members of the parish even if they don't come to worship services.
- Over the last three years, we have welcomed over 100 people, a vast majority of them from other Christian denominations and some from no religious affiliation. Their path to belonging in our community comes from getting to know people and feeling included, welcomed and loved, which is affirmed through sermons, the open communion table, formation/Christian education, and fellowship. As these newcomers feel embraced by the parish, they commit to it as members (filling out a form) and then learn more about the sacraments and our church polity. As a result, we consider members of the parish anyone who wishes to be a member, which allows them to feel welcomed, take part in the activities and ministries of the parish, be part of decision-making, and take leadership roles.
- I am not sure our church is unique. It seems our membership is following the pattern of many rural, small churches.
- We have several families/members who are "snow birds," splitting their time between here and another home. Some of them consider themselves members here and may spend less than half the year here.
- Our congregation is aging and few younger people/families are joining.
- Not sure it is unique but most people in our congregation seem to understand membership as a thing "achieved" by doing: attending worship, giving, being part of general activities of the parish--not by qualifying via canonical definition. Many who join us don't know of transferring a letter or even think to do that. Seems generational in the people who ask with older

generations being both more aware of the letter and seemingly have more urgency for that task to be accomplished.

- I don't believe a formality of membership is important in our congregation. Individuals show up, are welcomed, and encouraged to keep coming and organically become a part of our community. I think most of our congregation think of members as the ones who "show up" and are a part of things. It is not a label or status that matters.
- I had been attending for 3 years before the subject was ever raised to me. It was just assumed by everyone. " yeah, he's a member here."
- We are a diverse church in terms of race and gender and we are very much united in Love. Sharing of the Peace is an up on your feet, hug everyone you can event. It goes on for quite a bit and it takes a couple shakes of the bell to get everyone back to their seats.
- Membership is when we have a record of baptism or transfer. Anyone else is an attendee. They may or may not support ministries. But they are not members.
- The parish lost its register when its previous priest died. In addition to the sad loss of many historic records, the parish had to start a new register. In practicality, this meant that the parish register equals the directory of current active members.
- Based in a rural area, but one to which many repeat visitors travel and still others who live here on a seasonal basis, our attendance and membership fluctuates season to season. In addition, during and post-covid, we have a faithful group of folks who now interact with our worship services as they are livestreamed.
- We have people involved in the life of the church who don't fit in the current categories of membership.
- Often the view on canonical membership categories changes by rector. We have had rectors that allow parishioners who do not qualify, according to the canons, to serve on the vestry. Other rectors, will not permit this.
- We follow the canonical definitions of membership. In our context, one becomes a member of the church through baptism, reception by a bishop, or through transfer of letter from a church in communion with the Episcopal Church.
- The biggest unknown is accounting for online viewers who are not members.

What challenges have our current categories of membership caused in your context?

- Finding people who meet the membership requirements can be a limiting factor for leadership positions.
- I can't think of any 'challenges'. As a small mutual ministry community, we have a high level of participation and contribution of time and talent, and a high level of financial participation. Our budget needs are modest, so there is not a lot of pressure on tracking giving statistics.
- Too many categories. Too much chasing down information and ancient baptismal records from churches people haven't attended in fifty years or more just to join the congregation. If only this could be a simple form (provided by TEC) and then a happy little certificate (provided by TEC) in return signifying membership.
- Parishioners may not know their information. They may not see the importance of deepening their faith and membership through Confirmation. That last is on us clergy to become better teachers about the church and what membership, stewardship, and the like entails.
- N/A
- Understanding diversity.
- Welcoming others from different racial, sexual orientation and other backgrounds.
- Having the physical stamina to be actively involved.
- Financial support ending when people receive their heavenly reward.
- It's far too complex. We have four new member classes every year, and I've given up trying to explain the different membership levels. Heck, it would be easier if you all just gave us: Bronze, Silver, Gold, Platinum as levels of membership. People get that...
- We just consider active people as members, and if people want to be 'official' members, they can sign the book on one of our regular new member Sundays. When the bishop's visit is upcoming, I invite those who want to become Episcopalian to start meeting with me for an even deeper dive. But we find that many people do not care about the official joining. Happy just to become active in the church.
- We could not possibly tell a person who is regularly active that they were not allowed to participate in annual meeting, even if they have not signed the book.
- Membership should signify commitment to the community, but sometimes someone's commitment is not evident to the leadership of the church.
- Once a year we try to stick folks in various boxes. It's a minor pain.
- Also congregations are so fluid. People come and go, disappear for months or years.
- They tenuous connections are also an issue

- In recent years there are far fewer "in name only" members . Attendance tidal is half of what it was fifteen years ago.
- The only challenge is in the parochial report. Which by they way does not impact parish ministry in any way shape or form. The challenge is the the data collected in the parochial report doesn't really capture who we are as a parish and the vibrancy of our community presence.
- Communicants in good standing is confusing. Did they receive communion at least three times, great, keep track and keep them active. But if we have communicants in good standing, it implies we have communicants in bad standing, when really we probably have someone who is inactive and probably doesn't consider themselves a member of the church at all.
- It is a challenge to bring in to our congregation, other ethnic groups, one problem is our location of the parish.
- N/A
- Most challenges are a matter of clarification. We have had some unsure how to become members (whether that means transferring a letter from another parish, being confirmed, or what), and when the explanation is begun, there is often a sense of confusion (perhaps surprise) at the different categories.
- None. They are all ignored and considered unimportant.
- In our context - not an issue
- It's very difficult to understand why the members of our (elderly) generation and young people see the importance of community at each level. Being baptized and then only being in the pews or working with the community 1-4 times a year seems to fill the bill for them.
- Difficult to explain and difficult to track.
- I have people who are active participants in worship, formation, and/or fellowship but are reticent to be formal members because of their perception that it will "lock them in" or because they have had negative prior experiences of membership.
- I have addressed that a bit in my comments above.
- Our folks are not aware of them, so it only causes me (the Vicar) problems when I have to fill out parochial reports and the like.
- The only real challenge is when it comes to the filling out the parochial report. The definitions are what they are...but I do like the category of "active, but not members".
- It's an administrative nightmare that has little to no relevance to our day to day worship or our community.

- The challenges truly only surface during parochial reports and other times in which we are asked to divide out what type of members we have. Otherwise, our routine operations are served well by thinking more in terms of active members and inactive members. For instance, we have a mailing list and email list for those who want to know the immediate
- none
- Mostly just trying to get the ways we actually track and measure our membership and participation to match the parochial report requirements in a way that doesn't undercount our members or minimize our vitality!
- We are not otherwise particularly preoccupied by the canonical membership categories. Instead we work on trying to invite those participating in our parish community to take whatever their next step is into learning, growing in faith, participating, sharing their gifts and joining God's work in the world.
- Various definitions create their own challenges and confusions. To be honest, we ignore the various categories in most contexts.
- Not all folks are baptized/confirmed in the Episcopal faith, but remain active in the church,
- People sometimes think they are a member simply because they had some past experience at the church. The current definitions help clarify who is actually a member.
- When I arrived at the church 3 years ago, the list of members included people who have not attended for many years, nor were they contributing financially. I simply counted people who are participating and who contribute financially, but I'm sure I didn't count some people I should have counted.
- None that I know of.
- The only challenge derives from what's required in the Parochial Report.
- No real challenges, other than limiting the participation of some faithful attendees.
- Few challenges
- We really ignore them most of the time.
- While I think confirmation is an important sacrament I am not sure it is necessary canonically to serve in some roles.
- Perhaps the biggest impediment the current categories of membership cause in our context concerns leadership. You cannot serve on a vestry if you aren't an official member of the church. It can be difficult to get people who aren't official members to serve as committee or ministry chairs – or to be able coordinate a ministry. Because long-time members can sometimes be reluctant to support people who are "new".

- When parishioners see the annual reports where our average Sunday attendance runs at roughly 30% of Baptized Members, they always question it. However, this may be more a question of proper education about the terms than it is anything else.
- They haven't caused challenges, they are just not very useful.
- Increasing the amount of young people is difficult under these circumstances because of how money is emphasized in being a member of a church.
- We are a small congregation and not one person fits precisely in any of the categories. We go through the our list of members and frequent attenders and pledgers and then say, "Okay, this one kind of fits Helen and we've counted her here, so cross her off the list so we don't count her again somewhere else." But it's almost entirely arbitrary how we decide which category each person goes in because few of them really fit.
- Often, people are on our "book" who aren't actively involved in the affairs of the church - or, sometimes, there are folks who are attending and have had conversations with me about their own spirits, but they aren't ready to be baptized or become "members". I'm much more interested in discipleship than membership.
- This helps us to categorize the different groups and thus better define the ministries.
- When people come back from ACNA, do we receive them or confirm them? How do we count regular remote attendees whom we never see? Why is confirmation required for some ministries when it doesn't have any true impact on whether one is an active member or not. (This raises the theological question of what Confirmation is after the revisions in '79)
- None. We ignore the current categories as irrelevant.
- From time to time someone who is not baptized and yet uninterested or unable to be baptized wants to join, and this can be tricky as we are trying to be faithful to canon law.
- Sometimes a waste of time keeping track of folks. Whenever I begin at a parish, there is a measurable number of people who leave instantly, and a huge influx of newcomers and new members. In my current parish, there isn't even a secretary, so it's a huge time expense asking for letters of transfer and guessing at parochial reports.
- They have not caused challenges.
- The do not really cause a challenge.
- Membership has limited time: Many have double jobs, to support their families here and the Philippines.
- Retired and aged members could not drive to be able to give their time. Grandparents stay home to baby sit.
- It is a challenge to attract younger families because we currently don't have Sunday School. We only have one acolyte and five adult lay readers .

- The congregation doesn't distinguish between categories so it's only the people responsible for the parochial report (mostly the priest and secretary) who even care.
- Those who donate only time and talent do not always have the same respect from those who also donate financially.
- None
- There have been no challenges with the current categories.
- Because we have ignored the categories of membership in the Diocesan canons, there haven't been any challenges.
- The categories are outdated and confusing. In our post-pandemic church, membership is not defined by one of these categories.
- Not really any as they aren't something that is brought up or really even thought about except when it comes time to complete the parochial report.
- none
- We have people who are faithful in attendance, who serve in many ministries, but can't serve on Vestry because they aren't confirmed and don't want to be (many are Methodists who want to remain Methodist but can't attend a church because they are LBGTQ+)
- General misunderstanding about who is what. We have people for whom our parish is their parish but we don't see them regularly. Some pledge and others don't. It's an awkward thing pastorally to say that, by definition, a person isn't a member unless certain circumstances are met.
- We have unintentionally caused offense by inviting people to officially join the church. Some have attended for decades and are shocked to learn that they are not members; some even asked if they were allowed to continue to attend if they didn't become members.
- Our Parish Registers are in bad shape, in some places incomplete and in others very poorly filled out. We are in the process of updating our Parish Register, and the lax practices of certain periods of our history make this a very difficult and time consuming task.
- We also find it very difficult to track adults and children who have been a part of our congregation and moved away but remain members.
- We think these categories of membership are somewhat outdated.
- We believe all are welcome will embrace anyone who wants to worship with us, so the categories are not a challenge.
- The only time we think about membership in terms of the current categories is when we work on the parochial report.

- Confusion about who really "counts" and pressure to "commit" before it feels pastorally appropriate
- The existing membership categories of TEC are based on important theological principles, particularly baptism as a step in committing to a path of faith in Jesus. Additionally, membership is often understood to afford rights and responsibilities (especially around participation, decision-making, and leadership) to individuals who have committed themselves to the parish community, signaled through baptism and communion.
- In our context, it's important for us to highlight the ways that membership and sacraments have been used to exclude and marginalize people, especially LGBTQ+ people and allies. A large number of people who join our parish are recovering from the pain that Christian denominations and institutions have inflicted by dictating who belongs and who doesn't. It takes a lot of courage and personal commitment for people to walk in through the doors of a church and risk participating and joining. It takes significant work on our part to show radical hospitality and welcome that helps people feel like they belong. Additionally, many of our newcomers are still wrestling to learn and unlearn bad theology about God.
- Imposing membership requirements, especially ones that require theological commitments, can be a significant barrier to witnessing the Gospel. Our stance that anyone can belong as a member is part of our witness that God doesn't have requirements of belonging: all belong. It's our radical welcome and hospitality, as we trust that the Holy Spirit is guiding people in choosing where they belong in a community of faith. As parishioners grow, heal from wounds and strengthen their faith, they choose to be baptize (if they haven't been previously) or confirmed.
- The biggest challenge is filling out the Parochial Report. Because of the way people are members until they ask for transfer or die, and we know about it, the numbers do not accurately reflect our membership. I do appreciate the count for "active members." That number more accurately reflect what is going on in the parish.
- Confusion on some people's part who feel like they are a member but then may find out that technically they are not. Or, they feel as if it is too vague because we do not tell people they are not members until x, y, or z happens but rather invite them to participate in the full life of the parish and then to discern. So, that often leads to a "at what point am I a member" feeling even if the technical process has been laid out.
- None that we are aware of.
- They have not been explained to the congregation at large. The focus seems to be on attendance, not initiation into the local church or even the Body of Christ.
- Part of our congregation consists of seasonal members who spend the winter months in warmer places. Some are actively involved in Episcopal churches at their winter residence. We count them among our membership, but so will their 'winter parishes.' Furthermore, some

attend services of another denomination in the winter months. The 'brand' of church seems to be less important than what they find in the life of the parish

- They just don't reflect the reality on the ground.
- Confusion in understanding. They don't really capture the level of activity by folks not in those categories.
- For our church, the membership categories limit parishioners' opportunity to serve on the vestry.
- Membership in the Episcopal church is a commitment and a responsibility. The Christian faith is covenantal. I believe that we should have high expectations of our members and that there should be a formal process through which new members are catechized and brought into the fellowship of believers. I would say that the greatest challenge to membership at this time is that we do not expect enough of our members.
- Figuring out exactly how often someone attends and receives communion. Trying to find a process of culling the rolls.

Does your worshipping community consider someone a member who is not yet Baptized or whose Baptism is not recorded in an Episcopal church?

- In our parish, we have had to delineate between the term "member" and "people of our parish". It has the tendency to set up a class system, with the cradle Episcopalians at the top of the hierarchy.
- Yes. We have a number of regular attendees, mostly via Zoom, whose baptismal status is unknown.
- While "technically" incorrect, I think folks who haven't been yet baptized or had their info recorded in the book are nevertheless "considered" members by others in the parish. Baptism is entrance into THE church, but ushers aren't checking certificates at the door to be members of this particular parish church.
- We considered all who attend on a regular basis to be members regardless of Baptismal status.
- All are welcome and with our constant flow of people moving in and out of the state.
- all who are part of our worship even online are consider part of the community.
- Most likely yes. I have never been asked by a member if someone is baptized, confirmed, if they transferred their letter, etc.

- We'll allow membership if they can show a baptism certificate from a Christian tradition. But baptism is a sine qua non-without it, no membership.
- People who formally join the church record their baptisms in our ledger. We have not yet had someone want to join who was not baptized. However, who knows if someone who is not yet a formal member but attends regularly was baptized? People are invited to be baptized at every big feast day when we do re-affirmation.
- Yes, particularly some of the college students who attend sporadically but feel connected to the community.
- No
- That's pretty much a biblical mandate.
- yes
- We have a person who was born in Vietnam and is Buddhist. She has been attending regularly and has asked what does she "need to do" as a Christian. Baptism is difficult for her as she is concerned how it would impact her parents. The worshipping community considers her a member even though she isn't baptized. In their minds, membership is determined by how often you worship with us.
- No. We follow the canons. However, I often have new members who don't know the exact date of their baptism in another church. So we check a box, and say "yes" they are baptized, and sometimes we'll put a year and month. We gain this information by having them fill out a "New Member Form" and we keep track in our Realm database (not the green book).
- Yes, we accept all people in our parish, we rarely ask if they have been Baptized or a member of the Episcopal church, unless they want to serve on the vestry. We then ask them if they would consider joining the church.
- N/A
- With a lower case m, yes--all are welcome, and all who attend and participate are perceived as being members. For those to be counted as full, adult Members (capital M), we do follow the expectation to be Baptized/have the Baptism recorded.
- Absolutely. But the truth is that we do not count members. The Church is not a club. Everyone belongs if they want to.
- No
- Perhaps not a "member" but I am finding that the people who attend and participate are not as concerned with those categories (although they are working toward reception in our parish) and are more active in the activities of spreading the Gospel message through action and speech.

- For membership we would seek to baptize one who is not baptized. We would consider someone a member of the parish if they were baptized in another tradition and that would not be recorded in an Episcopal Church.
- Yes--especially those baptized elsewhere. We are the church universal, correct?
- I addressed this above. We do consider them a member in every way, but we make clear the minor stipulation of not being allowed to vote or serve on Vestry.
- Yes.
- The community doesn't know if someone is or is not baptized. Everyone is loved, treated, and incorporated the same.
- Absolutely - we are known for being open, welcoming and inclusive. We have found that we are a place where others come to recover from the wounds inflicted by other church communities. With the bishop's encouragement and support, we practice open communion - welcoming all to receive from God's table. We've heard from several people that just hearing those words of acceptance and inclusion has been healing for them.
- We do consider some who are not baptized yet or in an Episcopal church as members, especially if they are infants and awaiting baptism, or older and expressing interest in becoming baptized at some point. We also consider them as members if they are baptized in other denominations recognized by the Episcopal church.
- They would not consider them a member if they had not been baptized. The baptism being recorded in the Episcopal church is not important. They believe baptism is required for membership.
- Yes, absolutely. And I'm actually a little shocked by the second part of this question. I assume this is based on the canons, but do the canons actually imply that only Episcopalian baptisms count???
- No; we still observe the formal definition of membership when the Canons so require with respect to categories of lay ministry and leadership. But all are welcomed and loved here.
- Definitely
- We only include the unbaptized as a member if they are in baptismal preparation (catechumenate).
- Yes, as the parish priest, I have not asked for evidence of baptism. Those who were baptized in another church are welcome in our church.
- We recognize many and all people who are Baptised in other denominations as being able to receive Eucharist. However, this does not make them members of the Episcopal Church.
- This would only be important, again, for the Parochial Report. In terms of real "membership" (in the sense of presence and activity), this is irrelevant.

- Not formally.
- Yes. We have a attendee who is Jewish. He does SO MUCH for our church.
- Yes
- I don't think we have any adults who are not baptized who attend church.
- We have several people who fully participate in the active life of the community, lead ministry, and would look like fully active members. Some of them are Jewish and have no interest in converting, but love the community. Others are agnostic and just aren't sure about baptism. There are many others that we don't have their records, but they certainly are members of the church by appearances.
- Membership is baptism into the Body of Christ either at this parish or a previous church.
- No. But again, I value the presence and ministry of a non-member more highly than the absence and lack of ministry of a member.
- They may not be a "Member" until baptism. But there is no doubt that they are a member of the family.
- Yes.
- Not really, no
- yes
- I don't know what the community thinks - I count that person just the same. To me, baptism makes no difference.
- We consider you part of the faith community and offer you participation in the process of becoming an official member of the Church.
- Yes
- Certainly.
- We would consider someone a member for the purposes of our Parish Directory of members, if they asked us to, even though we cannot enter them into the Parochial Register.
- Yes.
- The community considers Baptism requisite for adult membership.
- Yes
- YES. And as they journey with us, they finally are received and confirmed.
- Yes. We encourage all people to commit to baptism to become full members in the Christian family but we don't deny them communion if they wish to take it.

- Yes, generally. If a person is here and wants to be involved, we are more concerned with matching their gifts to appropriate ministries.
- Yes at times.
- By and large they consider anyone who is baptized and regularly receives the sacraments a member.
- Confirmation usually comes up if they are to be a delegate to convention or are in the discernment process.
- No
- Yes.
- WE WELCOME EVERYBODY just like Christ would. We don't exclude anyone because of baptismal status. We believe that if someone becomes part of our community and we do our job of welcoming them and helping them grow in faith, that baptism will follow!
- No. Baptism is the foundation for most of our thinking.
- yes
- Yes.
- No.
- For the sake of parochial reports, no. Functionally, yes
- Yes.
- Yes.
- Yes.
- Yes
- Yes, we do consider members of the worshipping community some individuals who are not baptized because our membership comes from the individual's affirmation of a sense of belonging (which they indicate when they fill out a membership form readily available on Sundays before worship). Realistically, this is a very small number because the largest portion of new parishioners in the past three years have already been baptized in other Christian denominations, and pastoral care and relationship-building helps orient those who are not yet baptized.
- However, we affirm our value of radical welcome and hospitality-there's no requirement to membership beyond a desire to be part of the community, an acknowledgment of belonging.
- There is one baptism... and if a person is baptized that person is baptized - and yes, we accept it. When a person joins and is received by the Bishop, we record the record of their baptism from the church where it took place in the Church Register. If a person is not baptized, the

invitation is made. I do not think we have anyone here who is not baptized. If someone comes who prefers for some reason not to be baptized, they will be accepted and loved and I pray that person will share with me their reasoning. It may just be a maturing of faith.

- Yes but only because they wouldn't want to say that anyone isn't. They don't, at least explicitly, say at a Baptism that someone has now become a member of the church who wasn't before.
- I would say yes.
- Technically the answer should be no. However, I am not sure how that canon has been adapted by diocesan canon or parish bylaw.
- Good question - we are a member of a larger church body, and that body has said that baptism is our rite of entrance. If somebody is not baptized, he or she would not be considered a member in our parish. That said, they may be actively involved in the life of the parish. As a common practice, we do not check somebody's baptismal record when they participate in our common life. We count somebody as a member when they consider themselves to be a member. (Pretty awkward telling somebody who considers themselves a member of the parish that - formally - they are not members yet)
- Yes., if someone is faithfully participating in the spiritual life of the congregation, attending services in-person or online, assisting in our many helping ministries to the community, studying scripture with us.
- Not officially, but unofficially the community does.
- When reporting in the parochial report, we do not count these persons as members, but we treat them as full members of the church and count them in our average Sunday attendance.
- We consider someone to be a member if they have been baptized with water in the name of the Trinity in our church, or have transferred their membership from another Episcopal Church, or have been confirmed or received by a bishop into the Episcopal Church.
- Yes.

What challenges have our current membership categories caused when completing the Parochial Report?

- In recording attendance, we don't count the members and non-members separately.
- None really. I believe we capture the folks above in the overall attendance numbers.
- I think the parochial report works best for those with the spiritual gift of list-keeping. I don't have that gift and must therefore apply as certain amount of "art"
- It is not always easy to discern the status of those who attend, unless they ask for information about making a formal connection to the parish.
- none
- No challenges I can think of. The Parochial Report is simply an annual "to do."
- It means I'm making informed guesses every year. I know I'm close, but I also know I'm uncertain. Particularly since we don't have a "member in bad standing" status.
- We have no idea who all the communicants are. Records are spotty and people do not withdraw or transfer when they leave. We're often not sure if someone who dies was ever listed as a member. So we cannot accurately count all our 'baptized members'. We just have a number that we add to or subtract from when new members join or known members die, but the total number is far bigger than the number of active parishioners. We do not know how many inactive people are lurking and thinking of themselves as members, but it's probably not as many as our 'total baptized members' implies. So that whole section on the parochial report is really meaningless. The only number that matters to a church, really, is active members, and everyone who is active in coming to church, donating, getting involved, etc is a communicant in good standing in our estimation. We don't have everyone's age, so filling out the number of people in each age group is also just a guess.
- Sometimes it's hard to figure out if what we mean by the categories listed is the "official" meaning.
- It causes my Administrator all sorts of worries. She wants to be accurate
- I'm not troubled
- Difficulty in assessing an accurate # of members
- The challenge is that the data collected in the parochial report doesn't really capture who we are as a parish and the vibrancy of our community presence.
- We are one of few churches in our diocese who keep track of active attendees not yet baptized, which we put in the parochial report. This is for people who haven't yet turned in a membership form or who are not yet baptized. I feel like in general, the church does not keep

track of this group very well, but this is probably the most important group to be discipling and including.

- Not much, remains close to the same.
- N/A
- There is what I suppose should be seen as a minor inconvenience of having to know the status of people in order to complete the PR, but that is not that much of a challenge (at least not in a small parish such as ours, in a small community).
- Since ordination in 2002, every Parochial Report with which I have been involved has used some form of guesswork to come up with membership numbers. The truth is that everyone is guessing.
- They result in continually requiring review
- I don't complete that report but the person who does has never expressed any concerns.
- Some of the categories are very difficult to determine with any sense of accuracy.
- I have people who consider themselves members who only worship online but don't give or attend in person. They aren't on our roles, but they check in each week. How do I qualify them?
- The difference between "lifetime" baptized Christian, every placed on the roll, and "active" category in the parochial report.
- It doesn't cause a problem, but my reports are probably not Canonically accurate. I interpret the spirit of the question and answer them as best I can with what I know of our community. We are a church plant and only a few years old, so those forms don't really reflect the data that is from our community.
- Anything connected to communicants or communicants in good standing is a problem.
- "All communicants of this Church who for the previous year have been faithful in corporate worship, unless for good cause prevented, and have been faithful in working, praying, and giving for the spread of the Kingdom of God, are to be considered communicants in good standing."
- What's good cause preventing them from attending? What is faithful in working, praying, and giving for the spread of the Kingdom of God? How much work, prayer, or giving does it take to be in Good Standing?
- Take out everything pertaining to communicants and communicants in good standing. If kids don't come because their parents don't bring them, is this a good reason to not attend?
- We can't accurately account for membership numbers, according to the current membership categories. We do our best, but it's a complicated puzzle, which takes an inordinate amount of administrative time and energy.

- The main challenge has been one of time and effort in trying to be sure that we are being consistent in how we record the numbers. It is hard to break down everyone into classifications we do not use on a normal basis. In other words, it takes time away from mission and ministry to focus on data entry and categories we do not find especially helpful in our normal operations.
- none
- As I said above, Mostly just trying to get the ways we actually track and measure our membership and participation to match the parochial report requirements in a way that doesn't undercount our members or minimize our vitality.
- It would be helpful if membership categories didn't come in quite as many flavors. This too easily leads to confusion and thus to inaccuracy.
- Different folks have prepared the report before I took my turn. I didn't have an understanding of where their numbers came from. I would like to 'start over' and make sure we are all on the same page.
- The folks who reported prior to me may not have understood the categories.
- Our 'attendance' remains stable (and has for years) with about the same number of folks arriving as leaving. Letters of transfer are rare from folks who attended another Episcopal Church.
- There have been no challenges.
- My eye cross when I complete this report - simply because I find it arduous to distinguish between the categories of membership.
- None that I am aware of.
- Given our focus on participation in terms of presence and activity, we would need to be overly formal in questioning people about Baptism, Confirmation, etc. to accurately complete the Parochial Report. In our case, these are more estimates.
- Accounting for all of those who are active participants in our community.
- The categories are challenging, especially when filling out the Parochial Report.
- We have "members" who are not canonically registered. We have members who have never transferred their membership from another parish -- despite repeated invitations.
- They really don't cause problems in the reporting.
- I think the biggest challenge is keeping track of affiliated members who don't fit the categories neatly. There is an assumption that people will transfer in from other parishes, that there is somehow neat codified membership across denominations, and that doesn't exist anymore.

- Since an active communicant is defined so loosely- we tend to over-report our membership because we technically include people we see 2-3 times a year, who do not give or contribute but are on our books as members. We do membership audits yearly and try to keep them accurate. Our active membership is around 500 people that we see regularly; the contribute and participate in worship at least once a month. There is another 200-300 that claim us, but we see them a few times a year.
- It can be time-consuming and adds unnecessary complexity.
- First of all, let's acknowledge the Parochial Report is not helpful to parishes... at all. It's an annual, anxiety-producing pain, and constantly changing the specifications makes it worse. Vestries must approve it, but most members' eyes roll to the back of their head when they examine it. All they tend to do is "rubber stamp" what the people who prepare it do, or make their lives far more complicated by questioning items they have no intention to help calculate. Make the parochial report extraordinarily simple, stop changing it -- or, better yet, do away with it completely. "Three Kinds of Lies: Lies, Damned Lies and Statistics"
- The real challenge is that the number listed for Baptized Members has not been proven for over a generation. Each year we add the additions and subtract the deaths, transfers, and departures to arrive at the new number. For myself, I don't make the adjustment to a provable list of Baptized Members because that would result in my baptized members showing a dramatic decrease when in reality the decrease is really the accumulation of missed decreases over many decades. I think the church should consider declaring a year to correct baptized membership to an actual provable number or adding a category like corrections to prior year that a congregation could use to make that adjustment.
- Again, it's just not very useful.
- Young people
- We are a small congregation and not one person fits precisely in any of the categories. We go through the our list of members and frequent attenders and pledgers and then say, "Okay, this one kind of fits Helen and we've counted her here, so cross her off the list so we don't count her again somewhere else." But it's almost entirely arbitrary how we decide which category each person goes in because few of them really fit. The parochial report is my best guess.
- Someone from my church helps me to go through the book and make sense of membership - but like I said, it means sometimes what is reflected in the Parochial report isn't what is our lived experience of worship and life together.
- Find the correct data of adults who come to our community, who have been part of another confession of faith.
- We don't always know if someone is baptized. The non-member category is impossible to accurately determine.
- Current baptized members has no basis in reality.

- There are so many different ways of counting membership, and most of us have lots of people on our rolls who don't attend. And then we have lots of people who do attend who are not on our rolls. Most of the challenges here are based on the nature of human beings rather than the nature of the membership categories. The other challenge is that most people they have no idea when they were baptized, and asking them that question can be a barrier to formal membership. And yet, baptism is the foundational sacrament of membership. So that does leave us in a bit of a quandary.
- Lots of guessing. THANK GOD for our treasurer who did this each year!!!!
- None.
- Not much.
- No problems (but concern and guilt). Few active Youth and children.
- Separating out the active members and those who do not attend regularly but do send monetary support to the church,
- It's mostly the priest and secretary who deal with the parochial report, but it's a pain in the neck! All these different categories, trying to decide which one a person fits into.
- One example: a couple who haven't set foot in the church since we elected a married gay bishop but whose "letters" are here--do we count them as "members"? How about the lesbian woman who was baptized in the Episcopal Church as a child but felt shunned s she came out, left the church, came back when we elected a married gay bishop and is slowly beginning to trust us again, but has not sought to get her letter transferred (from a now defunct parish, BTW) because she didn't know it was a thing? Does she NOT count as a member when they do?
- Who is actually functioning as a part of the Body of Christ?
- None
- None
- There have been no challenges with the Parochial Report.
- Determining the actual number of members is an art, not a science.
- SO DING DANG CONFUSING!
- The person who completes this section of the report tells me that it has not really been a problem.
- none
- It's a big guessing game.
- A whole lot of guessing.

- How many members do we technically have versus how many do we say we have? Based on a reasonable pool of people that could attend, we probably have around 200-250 members. Based on all of the people that are still technically members, that number jumps to between 700-800. As a result, we have to choose between what is technically right and what is realistic. The Parochial Reports, then, are inaccurate and because of their inaccuracies, may not be terribly relevant.
- As we prepare to conduct a capital campaign, we've struggled with the issue of who to include in the "every member canvass." Who are they?
- At least one previous rector ignored the Index in the Parish Register opting instead to create his own system for tracking membership. Additionally, his handwriting is illegible. As you might imagine, this adds a frustrating problem that could've been easily avoided. In practice, looking for any record from that time period requires sifting through very difficult to read names one page at a time.
- Because all of these records are recorded on paper, there is no search function that would simplify the process. An electronic means of tracking membership would be immensely helpful, and perhaps could even include a TEC-wide database that could further simplify the process of moving membership from parish to parish. (Church Windows, for all it can do, does not provide an easy and intuitive means of tracking this same information)
- As is the case with many historic records, women are very difficult to track in older parish registers. We have many examples of "Mr and Mrs. John Doe" with no reference to "Mrs. Doe's" own name, neither first nor maiden.
- It's challenging. Very challenging.
- None that we are aware of.
- The distinction between active baptized members and communicants in good standing is meaningless to the way we interact with our members.
- Online attendance does not currently count under ASA.
- As I addressed above, the fact that people are still considered a member here but do not live here or no longer attend. Our membership numbers are artificially inflated.
- Hard to count accurately with any reasonable sense that we are correct.
- None that we are aware of.
- They do not take into account that it's not easy to track non-members. It's not intuitive to track anything and Covid made it worse. How and when do you track eyeballs on Facebook?
- The Parochial Report makes a distinction between the "communicants in good standing" and "others active" (whose baptism is not recorded in an Episcopal register). I understand the importance of this distinction, but it does not match the lived reality of the congregation.

Some of our most active 'members' had to be counted in the "others active" category. I appreciated that the Parochial Report for 2022 did not make this formal distinction and approached membership based on how people live their lives within the context of the parish.

- The challenge that comes most easily to mind is how a hybrid in-person/online community who not only worships but studies and ministers together can be reflected in the Parochial Report.
- Confusion in who goes into which category.
- Because of the transient nature of our church community (we are located in a military town), we often don't know if a parishioner is a member of record in another church or if they are baptized or confirmed.
- none
- Most of the numbers feel like an estimate in terms of membership, ASA is still a valuable metric.

Is there language that would make defined church membership clearer or easier to understand?

- A clear and consistently applied definition of membership would be helpful.
- Not that I can think of, other than articulating the difference between membership in the Body of Christ and organizational membership in ECUSA or a particular congregation.
- There must be.
- A pamphlet or other resource might be helpful to have available for membership classes or to help fill out the annual report (if those categories continue). This might also be helpful for educating Vestries.
- No
- Not that I can think of.
- As plenty of our denomination's liturgists have noted, we have a conflict between what the BCP says is church membership (Baptism) and what the canon say church membership is (confirmation). This has to be fixed. Many doubt that the bishops will allow it. If we make the canons match the BCP, and we agree that baptism is full, complete membership in the body of Christ... then the bishops will feel they have nothing to do at parish visits. This of course is wrong-headed: We're the only denomination in the world that requires bishops for confirmation. Even the RCs don't require a bishop to confirm. We have to get over it--and that will take us a huge leap forward toward fixing this problem.

- Define anyone who does not attend church outside of Christmas and/or Easter and who does not donate to the church as an "inactive member." I think it is important to identify inactivity. People who don't attend church and don't donate need to be identified as inactive and they shouldn't be counted as members. A member, or communicant needs to participate.
- No need to define communicant vs. communicant in good standing. Who's going to keep track of all that? Either the person is active and known to others in the community or they are not. All who are an active participant should share the same membership.
- Categories like regularly attend with a definition (3/month) irregular, rare.
- Pledging and/or contributing
- Engaged in parish ministry (teach, outreach, altar guild, etc)
- Involved in bible study or Sunday school
- Some indication of activity inside parish or parish outreach to world.
- I don't think language is a problem. I think our decade long of putting discipleship and evangelism on the back burner (or not even on a burner) is the problem.
- Drop the communicant in good standing, or at least clarify it - make it three times communion and active in the life of the church, or something like that.
- It can get confusing sometimes, if a member wants to join the episcopal church and they were baptized in another faith. But, we just ask of guidance from the bishop or the cool committee.
- "Communicant in Good Standing" should be removed. It's not really understood by most and, in Family sized parishes, it's not really applicable
- I am not sure the language is the issue; sometimes the concept of different categories can be confusing or surprising, but it is not so much a matter of needing to be (re)defined as just needing to be more easily shared.
- Remove all language about church membership. That would be the clearest approach of all.
- Plain English (not "legalese" / ' Church talk")
- I'm not sure. Communication across the community can be difficult. We all too often hear what we want to rather than what has been spoken.
- I think separating membership from the sacraments of Holy Communion and Baptism would help.
- Active participant versus inactive participant is easier to report. People these days report being just as active attending once a month as others who attend every week. People active in a ministry counts, not just active in worship. Who is more active, the person who attends worship every week, but does not respond to the world as Christ, or the one who responds to the world as Christ every day, but does not attend worship?

- Having received Communion should also not be a factor.
- Active members and Contributing members both seem like categories that would be more important to our understanding of our resources (human and financial).
- For membership it is helpful to know if a member is active or inactive. Our understanding is that an active member is in good standing, but an inactive member is one you don't want to lose touch with and need to keep on the roles for communications and pastoral touches. I can see how it is helpful for record keeping to distinguish between baptized and unbaptized members, but the rest starts to fall into too much detail. There are lots of details within member profiles that is helpful to a church, but these details do not need to be reflected in larger tracking of membership.
- The language of Communicant vs. Member in Good Standing is probably the most confusing as to what the difference is, so at the very least that should be made more clear.
- I am not sure how to change the language of this category on the report. In order to get a good demographic breakdown, you need age categories and markers.
- I'm iffy on having defined church membership at all. I don't entirely see the need, and I think it can be an impediment in the post-Christian context, where people's journeys into church can be slow and muddy and tentative.
- If we really have to have one, I'd suggest something really minimal and functional, like: Participates in the church's common life at least once a quarter, and contributes financially. But as minimal as that is, it would be complicated to implement! Who tracks participation and what happens if someone's participation falls off? - if somebody loses mobility, for example, and can't get to in-person worship anymore (in a parish without regular online worship), do they lose membership? And what about the people who support but don't participate - and the ones who participate but don't support?
- The only times I see real utility, in parish life, to a defined "member"/"non-member" or "not-yet-member" line in actual parish life are a) for new people who *want* to know what to do to become a member, and b) to know who votes at Annual Meeting.
- I'm sure there is; this is where a small working group could bring some good vision and discernment to bear.
- Good standing: In our congregation we have good standing members - attend every Sunday, participate in church functions, serve the community, receive communion - but they may not be 'members'. Not all of our folks pledge.
- It is currently clear.
- Yes -- using the words "attend" or "participate" or "financially contribute" would be helpful.
- The Canons are clear as they are written.

- See earlier comments/suggestions.
- Probably.
- Reduce the number of categories
- Yes!
- I don't think so
- Probably three categories:
 - Active Baptized membership
 - Inactive Baptized members
 - Affiliated Members whose baptism is not recorded.
- I think Member (baptized) and Average Sunday Attendance are the two most important metrics.
- Perhaps we should not focus so much on membership? Maybe we've arrived at a "post-membership" age in the church? It would be a little better to concentrate on overall attendance than membership. Ultimately, the fruits of the ministries a church operates is even more important.
- I cannot think of any.
- I think a member is someone who attends, and they should show up more than three times a year.
- I'm unsure on this one. Perhaps a committee could come up with something.
- See the College for Congregational Development manual for the module on church participation. The categories are:
 - 1. "Mature Practitioner" meaning they are involved at pretty much all levels of the church
 - 2. "Sunday Sacramentalists" meaning they attend church and pledge, but do not participate otherwise
 - 3. "Occasional Attenders" meaning they are Christmas and Easter people or maybe will do a one-off event, but are not involved in the broader life of the parish
 - 4. "Vicarious Members" meaning they are loosely affiliated either through occasional Sunday Worship OR because a friend brings them to events enough that everyone knows them, but they have their own church OR they show up to receive community resources and/or volunteer so their lives are shaped in some way by the church, but they are not necessarily Episcopalian or even Christian

- I wonder whether we really need to know church membership? What difference does it make? Where do the parochial report numbers go anyway, except to "The Church"? I understand wanting to know trends in the church, and I know we are called to baptize - but couldn't we report average Sunday attendance and how many we baptize in a year and do away with membership as a category?
- We try to clarify the themes and issues proper to the Church with our people to the extent that they can understand.
- From a denominational standpoint, it's important to know how many people are enrolled in the church. At the parish level, it's more important to know how many people consider us home.
- Get rid of the "member" language and use "participants" instead. "Member" seems like an exclusive club.
- We talk about people who are baptized who support the church through regular worship and financial support. (At the same time we welcome the unbaptized actively).
- ASA and budget are MORE than enough quantifiable variables to measure and track.
- In our context, requirements for membership are clearly defined. This is especially helpful in responding to concerns regarding eligibility for voting during the annual meeting. Members do not seem to have any difficulty in understanding the definition as currently presented.
- In a rural area like ours, all the churches of all denominations are rather fluid, we all know each other and are connected to each other and people float amongst the various churches depending upon circumstances. The current definitions work for reporting purposes.
- None at this time.
- None that I can think of at the moment.
- "There must be. This old-fashioned system is ridiculous in present times."
- "This tendency to pigeonhole people and base a lot on how much money they give is not consistent with my understanding of our faith."
- Simplify simplify simplify. What is the PURPOSE of so many different categories? It comes across as a kind of caste system. Not helpful.
- No
- Not necessary
- The language seems to be clear as it is written.
- A clear simple definition of what it means to be a member of the Episcopal Church would be helpful. It would also be useful to understand whether a parish church can have a different definition of member than what is defined in the Church canons. Also, when we talk about

membership in general, does the Church make a distinction between membership for ministries and membership for voting at Annual Parish Meetings? One other question: we consider 18 to be the age for voting at St. John's. However, we consider children "members" of the Parish and they participate in ministries. This distinction between participating in ministries and voting and an age requirement should be clarified.

- Make it one category
- We feel that this is probably a much bigger concern in the larger churches.
- Just member
- I think attending member, baptized member, and confirmed member might be easier with the current Canons.
- I'm not sure.
- Yes, but more emphasis should be placed on simplifying the categories.
- Maybe, although not all of us here are comfortable with categorizing people. Perhaps, seeker and baptized?
- I'm agnostic on the value of defining membership.
- In all honesty, I don't have a good answer to this. I recognize that an institution like The Episcopal Church or a diocese would seek specific membership requirements, such as baptism and communicant in good standing (i.e., regular attendance and pledging). In my opinion, there is room for parish membership to be more welcoming and encompassing than other memberships (e.g., to the diocese, the Church).
- I think membership needs to include residency. I baptized a child last year and the family has moved. That child is member until... I did inform the family they need to have his membership transferred when they get a church in their new city.
- A child of God who actively participates in our church and offers their time, talent, and treasure, as a way to enrich the fellowship, worship, and the work of our community in Christ.
- Yes. Members are baptized communicants. Communicants are baptized but are not members. Perhaps re-wording the language of the current categories is helpful. I like the current categories. They are clear to me. But they don't seem to be clear to my congregation.
- I like this definition of church membership: members in good standing are those, who "have received Holy Communion at least three times during the preceding year" and are faithful "in corporate worship, unless for good cause prevented," and "in working, praying, and giving for the spread of the Kingdom of God."
- This language focuses on how members live their life within the context of the parish, and pays less attention to formal benchmarks: are they baptized, and has their baptism been recorded (if so, where); have they been confirmed or received by the Bishop.

- We struggle with the word "membership" itself. We are not a club or civic organization, but an Episcopal faith community striving to be a place of welcome and belonging.
- Active or Nonactive - with a clear definition of each. In addition, note age, race, gender, baptism, confirmed.
- We don't have alternate language to offer, but membership sounds very clubby -- exclusive rather than inclusive. Talking about membership does not seem to follow the idea of God's grace extending to everyone.
- There is a lack of clarity around the importance of the rite of Confirmation. Under the current definitions, confirmation seems to be more important for people who come to the Episcopal Church from other denominations. The necessity for confirmation seems to be less important for those baptized into the Episcopal church. The expectations around confirmation should be strengthened and clarified.
- Not sure.
- Making changes to membership categories would likely impact both The Episcopal Church and Diocesan canons as well as parish bylaws. What challenges and opportunities do you see in shifting those categories? Are there places in your local canons where you can identify current or potential conflicts?
- Practically and theologically, the notion of 'membership' becomes a complex issue. Organizationally, the national Church and parishes of different sizes and ministry complexity will have different needs, to which tracking and categorizing participation by a variety of characteristics (baptized, communicant, financially contributing, etc) make sense. For others, such as ours, the categories neither help nor hinder. Theologically, I would put emphasis on the number of people we are reaching with the Good News who are present on a regular basis. Baptism remains the critical outward sign of committed relationship in Christ.
- None, especially if the TEC publishes diocesan canon and parish bylaw verbiage/language recommended for adoption. Make it easy on everyone!
- I am not sure. I would not to consult the canons of the Diocese.
- N/A
- It would be easier to answer this question if I had an idea of what the categories might change into. What we use now makes sense for a Parochial Report and, although these categories don't necessarily affect the way our ministry is handled, they provide a basis for the Parochial Report.
- Again--the major conflict is between the BCP and the Canons around confirmation. That will be the hardest thing to deconflict, because all kinds of scholars (from Ruth Meyers to Jim Turrell) have recognized that bishops don't want to give up the "right" to preside at confirmation.

- But making changes is essential. And IF changes aren't made--clergy are going to keep doing their own thing anyway, and just guess at the numbers in the annual report.
- I don't know.
- Most "parishes " have fewer than 70 people
- Realistically daily life is survival mode. The record keeping is not important to them.
- We're a healthy secure parish 150 asa. I'm glad to fill out the paperwork but really it's not important to me
- I care about people growing in God and faithfully doing ministry. I'm trying to be faithful. Trying to assess if someone is in good standing who stopped attending because her kids play sports now isn't of concern to me. Connecting with her is.
- I just do not see any benefit is officially changing the membership categories of the Episcopal Church. It may be well meaning, but I think it would have unintended consequences. In particular, it has the potential of diminishing the centrality of baptism in the life of those who follow Christ.
- I don't think so
- N/A
- While I am in favor of any steps that will help the church grow, I have to wonder if these changes will be those sorts of steps. I see this creating necessary change to fit the new categories at all levels, but how is creating some newly defined form of member going to strengthen the church. Are we truly finding that our issue is people discover they are not considered a communicant in good standing after staying away from the church for more than a couple of services over several years, and so we believe they will be on their way back into the fold and to the front of the parish if we create a new label for them to have fitted upon them? I see not so much conflicts in the current situation as the inevitable frustration of those who resist change, coupled with the fact there will be considerable work to align canons and parish bylaws without necessarily seeing the desired result of strengthening/increasing our rosters.
- If we honestly see ourselves as the Episcopal branch of the Jesus movement, then we will get rid of membership categories. These things do not come from Jesus. I hope we will be radical and faithful enough to reform our church to align with the early Jesus movement. In the Gospels, we never see Christ turning people away because they were not "members" of his movement. The Episcopal branch of the Jesus movement exists to serve everyone, no matter who they are. Let's write this into our canons.
- No

- Perhaps we don't need to change these categories but do a better job of explaining what is meant by each one and possible responsibilities are associated with each. It could be similar to what is done with/for vestry members.
- For me clarity would simply benefit us.
- I don't see any challenging conflicts in our context. It is mostly an administrative change unless we met resistance from people who do not like the suggested changes.
- The biggest challenge will be the "old guard" who feel the current categories are necessary to judge if the church is dying or growing.
- I believe our clergy compensation committee is considering ways to rework some of the canons around compensation tiers... which would make our compensation more just across the variety of parish configurations. Membership numbers may no longer matter in that regard at least.
- We see this as a relatively easy issue to remedy with an amendment clarifying the new language that can be added to bylaws and such. I am sure that those who focus on the canons more closely can identify potential conflicts, but that is not what I have chosen to focus on in the past.
- There are challenges in every change that occurs. Changing canons is not a simple process but it is achievable.
- This is above my pay grade!
- I should be more familiar with local canons and am unable to offer an opinion on this.
- I would love to see the language simplified, while honoring the spirit of the canons,
- We worry that changes would make the process murkier and more difficult for churches. Now more than ever, we need clear expectations of membership and discipleship. It is important that certain standards such as the necessity of baptism be maintained, as well as a record of financial giving.
- I would really like to see clarification to the TEC Canon 17, Section 2 (a) and Section 3. This is my go-to material for completing the Report and I find it confusing. Does this mean that actually receiving communion 3 times per year makes one a communicant/member? I have people in my congregation who attend regularly (and give), yet don't receive communion. I am also unclear about what it means to be prevented for good cause from worship.
- Shifting membership categories would be a whole new way of thinking, and confusing for the more traditional members of TEC who do not like change. I understand that opportunities might open up to make welcoming people as members in other congregations more simple and obvious to outsiders, but I do not see the necessity in my parish.

- Not sure about Diocesan Canons; no conflict with local bylaws. At the parish level, we would see no major challenges in shifting categories to something like we have described, with the opportunity to better understand exactly how people (and how many people) are truly involved as members. Of course, if some other set of categories is decided, this may not be the case.
- There could be conflicts with our state law concerning the Episcopal Church. A lot of rewriting would be needed, but a thorough job should eliminate conflicts.
- Not sure
- N/A
- Nope
- There would need to be some changes, but this is simply language shifts. Nothing to challenging just time-consuming.
- Communicant in Good Standing is often confusing for folks.
- One challenge in our context is dealing with people who perceive that membership in the church (and particularly long-time membership) allows them to make decisions and have authority without doing any work. They are often resistant to visitors and the work of evangelism and growth, because they don't want to give up the "power" over the institution they purport to love. Instead of the current categories, have Active Members, Inactive Members and Active Non-members. Make the definition as "Active" as being present (in-person, not online) for no less than half of Sunday services for the year. Receiving communion three times in a year as being a "Communicant in Good Standing?" That's just silly.
- The canonically important number for my diocese is average Sunday attendance, so a change in membership definitions would not have a canonical impact.
- Voting members are defined by our canons, but we generally allow anyone at the Annual Meeting to vote.
- The broader you make it to be member of the church, the more people you'll get because not everyone is the same and not everyone will see it necessary in a modern sense that being baptized for example is a be all end all for being a member of the church.
- Frankly, any streamlining would be helpful.
- I don't know enough about canons or bylaws to know what it would change, except perhaps priest pay scale - we use a category based scale based on church membership. Frankly, I think this needs to be overturned anyway - I think all priests should be paid a flat rate. Parishes, missions, etc - our work is different, but should be paid the same.
- Any change that is made in the categories of members should be thinking about the welfare of all and try to affect as little as possible the proper functioning of the parishes.

- The current categories are irrelevant and ignored. If that is an issue then the categories should be updated.
- I believe that the Episcopal Church needs to affirm baptism as the central category of membership more. We need to clearer about what baptism means. We need to teach baptism, invite people into baptism, and share the baptismal faith. I understand that not everyone will be able to make the plunge, but they want to be part of a community for whom baptism is normative, and we need to do a better job as a church at showing everyone what that means.
- See above.
- This is difficult to answer without knowing what changes are being considered.
- If changing categories is a problem, don't do it. It is not a problem for us. We fit our circumstances into the reports we make.
- None.
- Not that I can see.
- Probably, but conflict is part of life. Make the changes and fix the conflicts as they come along. Don't we already do this for other things?
- None
- May be more trouble than it is worth. My only problem as a relatively new priest is trying to fill out the parish register correctly.
- I think one of the opportunities would be that members who are unable to attend frequently may be able to serve in other platforms such as vestry.
- St. John's is currently out of alignment with the Diocese. We will need to revisit our by-laws once this task force completes its work.
- no challenges here
- Here, also, we feel that these issues would be more of a concern to the larger churches.
- All that membership should require is a Love of Jesus Christ , a profession of faith, witness to love and serve your neighbor, regular attendance to the Word and Sacraments of Holy Communion
- The biggest area is that opening vestry and deputy roles to baptized member would open up more people for ministry.
- If changes are made, I think having diocesan chancellors/staffs direct possible language changes for parish bylaws would be good. We have so much administrative work happening at the parish level and having somebody who is a professional tell us what language we need to use would be good.

- Any change to how we categorize membership would necessarily lead to a considerable amount of work and time to bring TEC and diocesan canons into line. But we feel it would be well worth the effort.
- Our canons do not conflict currently. If TEC made a change, the diocese would follow.
- Not sure the current categories have meaning. Changing our language might include more people which is a good thing. Voting issues would arise. That most certainly would be a challenge. Membership matters. We would like everyone to feel like they belong. On the other hand, for significant issues that require a vote, a serious commitment to the church is important. This is challenging.
- None that we see.
- Nothing comes to mind regarding local canons. Shifting might impact some clergy compensation guidelines.
- I believe the challenge is in turn an opportunity. What does it mean to belong to a community of faith? When we witness that ALL are God's children (no requirements for membership in the family of God), then defining categories of who belongs based on different actions within the institutional church can be counterproductive. The challenge continues: institutions want categories, while our faith witness breaks down categories. We have an opportunity to make a theological statement of welcome.
- For example, our diocesan canons currently have the following categories: Member (which refers to baptized members), Communicant, and Communicant in Good Standing.
- I might recommend that we change the current category: "Member" to "Baptized Member" keeping the same definition: "Any baptized person who is a member of The Episcopal Church and whose baptism is recorded in the records of the congregation, and who regularly participates in the worship of a congregation shall be deemed a member of that congregation." I'd recommend adding a category called "Member" defined as: "All who discern a desire to join a worshipping community are welcome as members, indicated by a process determined by local parishes."
- By establishing that all can be members, we align our faith with our institutional organization.
- Not sure.
- If changes are to be made, they should be substantial and work to be proactive by looking for solutions for a future where church attendance across all denominations will continue to be in decline. Hurdles to membership should be eliminated, or at the least greatly minimized. We should be focusing on inclusion of all without the need for labels or categories of membership,
- I can foresee a lot of confusion. I can see the shift as a kind of way to affirm behavior already in practices in parishes that make membership about "being known to the treasurer."

- I do believe that baptism needs to be maintained for what it is: a rite of initiation into the Christian body., Beyond that, membership is determined by how and where the baptized practice their faith and spirituality. Membership categories beyond the question 'is this person baptized' are in most cases not helpful to the life of a parish. For instance, diocesan canons require vestry members to be "confirmed communicants in good standing." In a small rural parish, where the pool of people willing to serve on a vestry is already small, requiring confirmation sounds ideal but is not practical.
- I believe we will be able to overcome these challenges. It is important to try to keep things simple and clear.
- These changes would mostly be wordsmithing and making sure that our canons are not in conflict in differing areas. Making changes would be time consuming but more in keeping with the idea of opening our church doors and welcoming all.
- I would like to see us uphold the traditional understanding that a full member in the Episcopal Church is a baptized, confirmed, communicant, who is faithful in regular worship attendance and stewardship.
- The biggest change is creating a new paradigm that moves away from a country club atmosphere of counting members and moves to something more like the Book of Acts that was a church with less physical, emotional, and spiritual boundaries.

Are there any other comments or thoughts you'd like to share with the Task Force?

- I am grateful for your work in exploring this complex topic. Blessings.
- I'm glad you are taking on this work. Thank you!
- I think it may prove helpful to focus not on categories but on the lives and ministries touched by the local church communities.
- We cannot divide people
- Praying this helps!
- Yes. At the end of the day, I don't care about my membership numbers. In no particular order, I care about 5 things: 1. Are people coming to Sunday worship? 2. Are people contributing financially? 3. Are people engaged in serving and supporting the mission of the parish? 4. Are people growing in their knowledge of Scripture and practice of prayer? 5. Are people being cared for by the clergy and lay pastor teams?
- I've served as a priest for 26 years--and every parish I've served, has grown every single year of my ministry. I'm not a particularly charismatic individual; I'm not charming; I don't look like

an Italian soccer star. But focusing on people's spiritual growth and spiritual care--and also getting them to engage with 1-3 above--has proven to be a plain vanilla recipe for numerical growth. This is the priority, not tracking membership. Make the membership language easy and accessible.

- It's great that this is being considered, because the parochial report time is universally disliked by clergy, especially those who do not have organized staff or lay leaders to handle all the details of membership.
- If we truly welcome everyone, we don't need to make a big deal about who's in and who's out and who's a more perfect communicant than another.
- Not right now.
- This is a tough task
- As people are aging and younger folks are less strongly church people it's hard to figure out whose part of us.
- Beware of trying to construct categories which deceive-like pretend the deep decline isn't a decline by finding new ways to count and fluff up the numbers.
- We do daily morning prayer and four bible studies. Non parishioners come but they don't need to be counted as members; just attendees.
- I understand the desire to perhaps add the categories of "not yet baptized" and "baptism not yet recorded" but I don't think there is much to be gained in this. Don't you think a more important use of time would be addressing the drastic drop in membership over the past few decades which has accelerated in the past few years? The drop in membership has nothing to do with the categories we use. In fact, I'm concerned that changing categories is a way of not holding our feet to the fire as pertaining to the decline of the Episcopal Church (as measured by membership).
- Thank you for the work you are doing, to better all and bring us all to understand the process.
- I have taught confirmation to both youth and adults, and the results have always seemed to "work" in terms of helping the confirmands understand the context of their actions and their own parish in the greater church. I have heard people being confirmed proudly announce that day as a moment of personal achievement and celebration, and I think that suggests the current categories do work. In my parish, at least, there are those who are active supporters of our mission who take part regardless of their assigned membership category, and I do not believe it will change in this church.
- Let's be serious about what it means to be "church". This is not a club. There should never be membership categories which define who is "in" and who is not. That is the thinking of "the world" in opposition to the reign of God. Everyone belongs to God and we are gathered together to serve the world, therefore everyone belongs in the Church!

- I'm glad you are trying to get creative. The old guidelines don't work these days. I wish I had more insights, but I do know that "membership in Church" is less important than actually being the Church.
- Should it be reworked, the data collected by our parochial report, would help us reconsider the ways we invest/allocate TEC resources - to support and encourage mission and ministry with, to, and by marginalized communities.
- We are glad that you are examining these membership categories which seem outdated and unclear. It feels as though we can free up hours of time and effort if we can simplify these overcomplicated categories and move on to more important matters in ministry.
- It was pretty upsetting this past year not to be allowed to count our Zoom members. I understand that online worship is mushy terrain. I would just stay that there is a HUGE difference between the folks who participate in our Zoom service - reading lessons, praying for and with one another, present, visible, named, and active - and whatever Facebook counts as "views" when somebody broadcasts their service over Facebook. To me, my Zoom participants' level of engagement and investment is virtually indistinguishable from that of my in-person worshippers; the only difference is the lack of regular sacramental participation, per se. I know that "grading" online worship participation is a sticky topic - do Zoom worshippers count as a full human for purposes of ASA, livestream viewers as 75%, Facebook "views" as 50%? I don't know how to handle this. But I know my Zoom worshippers count in my ASA, and next time I'll just count them as such, whether invited to do so or not.
- Insofar as the Parochial Report seeks demographic information, especially with respect to race or ethnicity, such efforts are absurd. The suggestion that worshiping communities conduct a survey to allow people to "self-identify" is, frankly, laughable given how few people actually respond to such surveys.
- I comment you for taking a look at this and look forward to feedback from what you learn.
- Thank you for your time.
- I am so glad you all are looking at this language! Just thinking about the Report and the classification of membership gives me a headache. I recognize the importance of baptism and confirmation, but I simply don't think it is helpful to spend my time tracking this. I would prefer to spend my days (my agreement is for 3/4 time) welcoming all people to worship.
- I am tremendously grateful to you all for taking on this topic and for asking good questions. Thank you!
- Personally, I cannot understand why changes in the rules/Canons are necessary to define membership in TEC. I feel that I attend a very inclusive parish in an inclusive Diocese in an inclusive Church. Perhaps other church parishes have different experiences.
- Thanks for asking!

- Thank you for asking the question.
- The parochial report really needs to be simplified. But do not go away from Sunday Attendance or Weekly Worship Attendance as a prime metric.
- I've been ordained over 17 years -- serving as a parish rector for almost 15 years of that time -- and this is the first time I've ever been chosen to complete a survey for the "national church." I've often wondered how many other priests (like me) who get through their entire career without ever being asked their opinion or included in a "task force". I imagine there are plenty of talented people whose experience remains untapped as they have never/will never be elected as a deputy to General Convention. My question to the Task Force is admittedly critical. Are you willing to ask the difficult questions and do the difficult work or are you simply an echo chamber -- listening for only what you want to hear and enjoying positions of perceived importance?
- No
- I wonder if these categories of participation could be considered person by person. Like, all the people go in the left hand column and the different qualifiers go in the rows across the top and for each person you could check yes - baptised, yes - pledges, yes - active member, no - not Episcopalian, . Then you could see "this church has 200 active members and of those 200, 176 are baptised and 20 of them don't consider themselves Episcopalian". The national church could even provide an online importing site with the boxes to check already in place, so they just have to copy and paste all their people in and then check the boxes. In order to do the parochial report, we are already combing our directories and membership rosters, anyway, so the work is already being done. This just ensures that the questions are more straight forward and that we don't worry about counting people twice because we can count them in the multiplicity of ways they appear in our context but the national church knows it's still just one person.
- Thank you for your work!
- We appreciate this work and the consideration of taking into account the opinion of our Church.
- I would like to see a liturgical mechanism for recognizing people a "members" other than confirmation which happens no more than every year. We need something where we say, "you are a member". It will go a long way to making folks not ready for confirmation to feel as though they belong.
- In our associational culture, the very idea of membership is already a gift from the wider culture. We need to do a better job at teaching what makes membership in a Christian church distinctive from paying one's Netflix bill or gym membership etc. I think that simplifying membership to affirm that actively living out one's baptismal faith is the point of membership. We can still retain the need to record baptisms. And we can still ask people for that information

where they have it. But we can also promote the reality of a living an active baptized faith that while conceptually similar to a communicant in good standing, puts the focus back on baptism. Perhaps there is a way to ask people whether they are wanting to live out the baptized life of fellowship with Christ, rather than whether they remember their baptism date. Some will be able to record their baptism date, but more will be able to answer 'yes' to whether they seek to follow Christ in living out the baptismal covenant.

- More information regarding the changes being considered would be helpful. Anticipating possible challenges or opportunities is not possible without more specific information.
- Perhaps you could add categories without problem, We also have people who are several denominations or faiths. Such as Roman Catholic and Episcopal, or Congregational and Episcopal, or even Buddhist and Episcopal.
- The exclusivity of denominations does not seem to be beneficial, but it is working as is and I would not want to have to list everyone's different faith journeys.
- None.
- None
- We are committed to hospitality, to "making room" as our priest says. There will always be people who resist that--but Jesus was pretty clear about the expansiveness of the Kingdom of God. Changing language/categories will break old patterns of thought and help us recognize a wide variety of commitments, so that every person is given the opportunity to do ministry as they are called, equipped and able.
- Dig down and ask WHY do we need this demographic reporting? How is it proclaiming the good news, seeking and serving Christ in every person, respecting the dignity of every human being, promoting justice and peace, etc?
- To what degree is this desire to keep track and categorize reflect the values of EMPIRE and not KINGDOM?
- From the rector: I was moved to tears by the passionate responses of those involved in crafting our response. They DON'T CARE about the categories and the boxes and the labels and reject the idea that they are in any way part of the mission of our church. There are various levels of engagement, because people have lives; all are trying to do God's work in the world. As one person wrote, "All I know in the church certainly spread God's love and the message of the Good News. I've never asked anyone for credentials."
- no
- Spend less time defining categories and more time on spiritual formation
- While we already take an expansive view of membership, we do have concerns about potentially lessening the role of Baptism and Communion in the definition. We hope the Task Force will find a good solution for this.

- We have an average of 8-10 members in attendance on most Sundays. There are very few young people and they don't attend on a regular basis. Most of us are retired. What is most important for us to keep working together as a community and to also be a presence in our community is for each of us to be willing to give of time and talent. The number of people for whom receiving communion on a regular basis is important to their spiritual well being is also very important to us in this community.
- If we treated our membership like they were loving family members things would be much better.
- Our categories and means of tracking membership are antiquated and do not reflect the reality on the ground of parish ministry. The current system is exclusive and anachronistic and needs to change. For example, given advances in technology, why do we still use carbon paper?
- This is a difficult issue. On the one hand we want to be inclusive, but on the other hand we want to take seriously what it means to be a part of the church. We would add that we think the current language around membership is not well understood by most members in the church. At the end of the day membership is about commitment. Do the current categories fully identify folks who are committed to God and God's church.
- Grateful that the Task Force is asking these questions.
- I'm grateful to get to contribute in this process, and I pray for your leadership and discernment in this work for the Church!
- I believe I have shared what I can. Good luck. God bless your efforts - you have a daunting job.
- As part of our current strategic planning process we are wondering if there might be other ways to define membership or other ways for people to become members of some parts of the life of the parish almost like a subscriber or like someone who is a regular donor to a local arts organization, for example. Could they support our food pantry as a "member"? Could they support our music ministry as a subscriber to a concert series? Just ideas and wonderings for now!
- I do not believe an unbaptized individual should be denied communion.
- Please don't change the categories. Engage them more. Explain them.
- I applaud your work. I wonder if rethinking membership can be done separate from the question of 'open communion', which is a sensitive/controversial question.
- I appreciate the work of the task force. This is important work for better understanding and more accurately reporting membership.
- The idea of noting a parishioner's age, baptism and confirmation make sense, but these notations really don't have much to do with membership. We would like to think that parishioners are members of our church family as soon as they walk in the door. There is no need for membership categories as a threshold to serve.

- Because of the transient nature of today's society, the idea of a letter of membership with one church seems archaic. Aren't we all part of one Anglican Communion? If the commission decides to keep these letters, at the very least transferring a membership could be offered digitally rather than by paper. The process as it is now is very cumbersome.
- It would be a departure from the historic teachings of the faith to do away with the requirement that members be baptized in the name of the Trinity and be expected to make a mature public affirmation of their faith with the laying on hands by a bishop in apostolic succession. (Canon 1.17.1c) What the Episcopal Church needs today is a greater sense of commitment and responsibility from our members, not a fast track to nominal membership.
- Thank you for doing this work.

Is there something that would make transferring membership simpler or more streamlined?

- A central database of membership would be helpful. Dealing with multiple parish records can be unwieldy.
- Would it be crazy to keep a national register? Could this perhaps just be a simple online form, provided by TEC. Anything that can be done on the national level is helpful to small parishes.
- The forms are straightforward and easy to complete for sending/receiving transfers.
- Not that I can think of. Like the Parochial Report, letter transfers are simply common practice.
- emails are fine in this day and age.
- For us, so few people use the form it's not something that's onerous when it occasionally happens. But all a new church needs is the new person's contact info including email, the dates for the ledger and maybe also a reason for transferring
- Contact the church they are transferring from and let them know.
- Having small parishes staffed to do it
- no
- We just write a letter on letterhead, include baptism, DOB, and any relevant information
- Not Sure
- The Letter of Transfer is believed by most to be needless bureaucracy

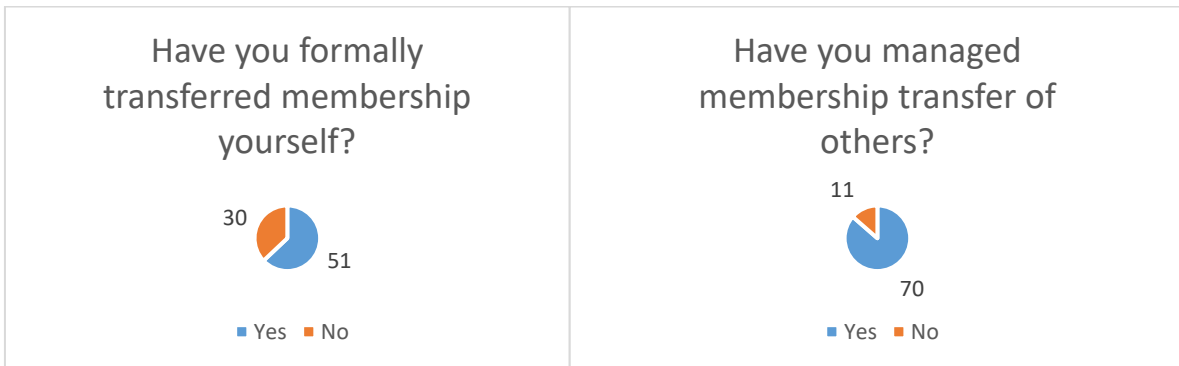
- I had ease transferring my membership thanks to the church I was leaving taking the lead; I am now Senior Warden in a church currently without a Rector, and so I have handled the transfer in and out for members of our Parish. That has been simple, but I did not know about the Episcopal Letter of Transfer; making that more evident would make it even easier.
- No
- An Online fillable pdf - "fill out and send" type format.
- Online forms to be sent via email?
- I simply have them fill out an information form.
- Not having to do it!
- No
- A national database where these changes can take place. These would be helpful with record keeping also.
- It's fine when it happens. It just almost never happens.
- Letters of transfer reveal the occasional sloppy or incomplete record-keeping of some Episcopal churches, especially when data concerning baptism, confirmation, and more is expected. Should, then, the transfer paperwork be simplified? Perhaps - or perhaps we need to reexamine the rationale for requiring this paperwork and adjust our requirements to meet the goals of completing these forms.
- Not Really
- It was very easy for me.
- Either not worrying about it or making it really clear to both the exiting and receiving parish that this is truly important. Too many times our Church Administrator has requested letters (at the request of a new member) only to never get a response.
- We really don't do it often enough to make a difference.
- We use a letter we created for transfers of membership. This is becoming less common over time.
- We use our own letter.
- There could be a "website-based tool" developed which has the standard fields for transfers between churches. Each church could have its info registered and when a transfer is completed, an email is generated to the appropriate contact with the form. No more paperwork necessary.
- No need to rely on the USPS.
- Better education for the members so lay people know to request that letter of transfer.

- I don't really know that it's necessary anymore. Clergy do each other the courtesy of checking in with the new member's previous rector. That really covers the information needed.
- No - I appreciate having the forms on the Diocesan webpage
- A letter of transfer.
- If there was an intra-Episcopal computer system rather than a cumbersome system of triplicate that would save money and time for many of our transfers, most of which are old timers wanting to update their letters.
- No, I also send a letter of introduction when transferring people.
- Let transferees carry the Letter of transfer, acknowledged by incumbent Priest through signing and returning it.
- To clarify above--I have used the Episcopal Letter of Transfer form but do not any longer because it is almost never returned.
- No
- Not really
- We generally have ignored this concept. It would be useful to have the Church weigh in with its view of how important this is.
- Why do we need it?
- Most of our most recent additions have been receiving people from other backgrounds whose churches have closed or they have moved to this area.
- Online option would be helpful
- An online form/database.
- Yes, modern technology (PS - This survey was considered by various members of the congregation with varying degrees of expertise. The priest filling out the form has much more than some of those consulted. As such, we selected options as a sort of average of the group present)
- Not really. Many folks come from traditions where there is no letter of transfer.
- Having an online form
- No. It went well.
- Online access
- An online form
- A way to do it electronically from one parish to another would be helpful.

- Our former church secretary recommends digitizing this process so a parishioner can do it online themselves.
- Eliminate the letter of transfer.

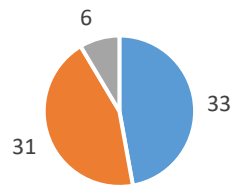
What is your personal experience of membership

- Have you *formally* transferred membership yourself
 - Yes 63%
 - No 37%
- Have you managed membership transfers of others
 - Yes 86.4%
 - No 13.6%



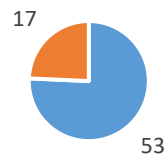
- If yes, how often do you manage the membership transfer of others?
 - Several times per month 8.6%
 - Several times per year 44.3%
 - Less than once per year 47.1%
- If yes, Do you use the Episcopal Letter of Transfer form when managing the membership of others?
 - Yes 75.6%
 - No 24.4%

How often do you manage the membership transfer of others?



■ Less than once per year ■ Several times per year
■ Several times per month

Do you use the Episcopal Letter of Transfer form when managing the membership of others?



■ Yes ■ No

Is there something that would make transferring membership simpler or more streamlined?

- We use our own letter.
- A letter of transfer.
- If there was an intra-Episcopal computer system rather than a cumbersome system of triplicate that would save money and time for many of our transfers, most of which are old timers wanting to update their letters.
- Contact the church they are transferring from and let them know.
- no, I also send a letter of introduction when transferring people.
- A way to do it electronically from one parish to another would be helpful.
- We just write a letter on letterhead, include baptism, DOB, and any relevant information
- No. It went well.
- An online form/database.

- It's fine when it happens. It just almost never happens.
- A national database where these changes can take place. These would be helpful with record keeping also.
- Our former church secretary recommends digitizing this process so a parishioner can do it online themselves.
- An Online fillable pdf - "fill out and send" type format.
- Having small parishes staffed to do it
- No
- Not that I can think of. Like the Parochial Repot, letter transfers are simply common practice.
- I had ease transferring my membership thanks to the church I was leaving taking the lead; I am now Senior Warden in a church currently without a Rector, and so I have handled the transfer in and out for members of our Parish. That has been simple, but I did not know about the Episcopal Letter of Transfer; making that more evident would make it even easier.
- Not really
- no
- Not really. Many folks come from traditions where there is no letter of transfer.
- I simply have them fill out an information form.
- No
- Not having to do it!
- To clarify above--I have used the Episcopal Letter of Transfer form but do not any longer because it is almost never returned.
- Why do we need it?
- Not Really
- The Letter of Transfer is believed by most to be needless bureaucracy
- Either not worrying about it or making it really clear to both the exiting and receiving parish that this is truly important. Too many times our Church Administrator has requested letters (at the request of a new member) only to never get a response.
- Online option would be helpful
- We generally have ignored this concept. It would be useful to have the Church weigh in with its view of how important this is.
- Most of our most recent additions have been receiving people from other backgrounds whose churches have closed or they have moved to this area.

- A central database of membership would be helpful. Dealing with multiple parish records can be unwieldy.
- Letters of transfer reveal the occasional sloppy or incomplete record-keeping of some Episcopal churches, especially when data concerning baptism, confirmation, and more is expected. Should, then, the transfer paperwork be simplified? Perhaps - or perhaps we need to reexamine the rationale for requiring this paperwork and adjust our requirements to meet the goals of completing these forms.
- Yes, modern technology (PS - This survey was considered by various members of the congregation with varying degrees of expertise. The priest filling out the form has much more than some of those consulted. As such, we selected options as a sort of average of the group present)
- I don't really know that it's necessary anymore. Clergy do each other the courtesy of checking in with the new member's previous rector. That really covers the information needed.
- No - I appreciate having the forms on the Diocesan webpage
- We really don't do it often enough to make a difference.
- Having an online form
- Would it be crazy to keep a national register? Could this perhaps just be a simple online form, provided by TEC. Anything that can be done on the national level is helpful to small parishes.
- Online access
- Eliminate the letter of transfer.
- Emails are fine in this day and age.
- No
- We use a letter we created for transfers of membership. This is becoming less common over time.
- For us, so few people use the form it's not something that's onerous when it occasionally happens. But all a new church needs is the new person's contact info including email, the dates for the ledger and maybe also a reason for transferring
- The forms are straightforward and easy to complete for sending/receiving transfers.
- There could be a "website-based tool" developed which has the standard fields for transfers between churches. Each church could have its info registered and when a transfer is completed, an email is generated to the appropriate contact with the form. No more paperwork necessary. No need to rely on the USPS.
- Online forms to be sent via email?
- An online form

- Not Sure
- Let transferees carry the Letter of transfer, acknowledged by incumbent Priest through signing and returning it.
- I was very easy for me.
- Better education for the members so lay people know to request that letter of transfer.

Demographics for your parish

- Is the area:
 - Urban 28%
 - Suburban 36%
 - Rural 36%

- Who filled out this survey:
 - 45 out of 81 filled out by clergy only.
 - 8 out of 81 filled out by a Warden, parish staff, or other leader of the parish, or both, with no involvement from clergy.
 - 28 out of 81 filled out by a team of clergy, staff, warden, and other lay leadership.

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Membership in The Episcopal Church

Submitted by The Rev'd Carlos de la Torre

For the House of Deputies Committee on the State of the Church 2021

Historical Development

The Genesis of Canonical Membership

The 1981 edition of Edwin White's and Jackson Dykman's *Annotated Constitution and Canons of the Episcopal Church* (revised and updated by the Standing Commission on Constitution and Canons of the General Convention) reports the first canonical enactment concerning the discipline and membership of the laity as appearing in Canon 12 of the 1789 General Convention:

If any persons within this Church offend their brethren by any wickedness of life, such persons shall be repelled from the Holy Communion, agreeably to the rubric, and may be further proceeded against, to the depriving them of all privileges of church *membership*, according to such rules or process as may be provided, either by the General Convention or by the Conventions in the different States.¹

Subsequently, this canon would be amended during the 1808 General Convention to make deliberate mention of Dioceses, which was excluded from the original version. In 1817 and 1832, the Canon was further amended for greater clarification on its implementation by Dioceses.

Transferring Membership

In 1852, General Convention enacted a new canon, Canon 13, "Of Removal of Communicants from one Parish to another," reading as follows:

A Communicant removing from one Parish to another shall procure from the Rector, (if any), of the Parish of his last residence, or if there be no Rector, from one of the Wardens, a Certificate stating that he or she is a Communicant in good standing, and the Rector of the Parish or Congregation to which he or she removes shall not be required to receive him or her as a Communicant until such letter be produced. (p. 386)

This was the first legislation of General Convention regarding the removal of communicants from one parish to another. In subsequent General Conventions, amendments were made, including renumbering the canon as part of general canonical revisions.

During the revisions of 1904, the canon on the Regulations Respecting the Laity (the canonical title used till this day for the section that describes membership in The Episcopal Church) was amended to make it the duty of the laity to certify their membership, and transfer their membership from one parish to another. The Canon was renumbered to Canon 39 and amended to read as follows:

Sec. 1. A communicant in good standing removed from one Parish to another shall be entitled to and shall procure from the Rector or Minister of the Parish or Congregation of his or her last residence, or if there be no Rector or Minister, from one of the Wardens, a certificate stating that he or she is a communicant in good standing; and the Rector or Minister of the Parish or Congregation to which he or she removes shall record him or her as a communicant when such letter is presented, or on failure to produce such letter from no fault of the communicant, upon other evidence of his or her standing sufficient in the judgment of the said Rector or Minister. Notice of the above record shall be sent by said Rector or Minister to the Rector of the Parish from which the communicant has removed.

“The canon as amended made it the duty of the rector to give such a certificate. The canon also permitted a rector to record as a communicant one who did not produce the certificate of transfer, provided that it was no fault of such communicant, upon evidence satisfactory to him that such person was a communicant of the Church.” (White and Dykman 388)

Further amendments were made in 1910 and 1919 that clarified language and phrasing.

Baptized Members, Communicants, and Communicants in good standing

In 1931, a concurrent resolution amended the canon on Regulations Respecting the Laity, inserting the words "or baptized member" after the word "communicant" so as to regulate not only the moving of communicants from one parish to another but that of baptized members of the Church.

In 1934, in a resolution from the House of Bishops, there was an attempt to define the word “communicant'.” This seems to be the first, or at least the first formal exploration via a

resolution, to clarify and define membership in The Episcopal Church; an on-going and evolving need that continues till the present day and that this Committee will be exploring.

For historical context, White and Dkyman comment:

“[During the 1961 General Convention] Resolutions calling for canonical definition of the terms "member," "communicant," and "in good standing," as they relate to members of the Church, were introduced at the Conventions of 1952, 1955, and 1958, but failed of adoption on each of these occasions.

At the Convention of 1961, after a decade of contention and debate, the Church finally gave meaning to the terms "member," "member of the Church in good standing," and "communicant in good standing." **The Church, by that legislation concerning three types of members, sought to end the confusion created by many dioceses giving their own canonical meaning to these terms without regard to the manner in which such terms were used elsewhere in the Church.**

However, the Journal for the 1961 Convention had not even been distributed when criticism of the various definitions began. Many of the tests were thought by many to be unrealistic and impossible of ascertainment.

Is a person who has received the Sacrament of Holy Baptism, but whose baptism has not been recorded in this Church because a Church official has neglected his duty, any less a baptized member of the Church? A mere definition cannot take away that which was received forever by the administration of the sacrament.

In 1961 and increasingly since that date, there has been little awareness within the Church of the requirement of the canon entitled "Of The Due Celebration of Sundays" (Title II, Canon 1), and few parishes attempt to test the good standing of their members by ascertaining the extent to which such members have kept the Lord's day by regular participation in the public worship of the Church and by hearing the Word of God read and taught.

The Convention of 1979 reviewed and debated the definitions adopted in 1961, and referred to the Standing Commission on Ecumenical Relations for study and report to the 1982 Convention resolutions involving changes in Title I, Canon 16. The definitions now in place do not appear to define and recognize present standards of Church support and are not now meaningful in measuring Church membership and participation.” (White and Dykman 391)

A 1979 Book of Common Prayer Church: The Last Four Decades

In 1982, the canon on Regulations Respecting the Laity (then Title I Canon 16, now Title I Canon 17) was substantially revised to reflect the language and theology [and the historical and social context] of liturgical reforms in the 1979 Book of Common Prayer, specifically “the concept of Christian initiation and Church membership indicated by the 1979 Book of Common Prayer.” (White and Dykman 1991 supplement, 35)

These revisions in liturgy, theology, language, and phrasing are foundational to our present version of the canon on Regulations Respecting the Laity; including our understanding and definitions of memberships.

Here is a side-by-side comparison of 1979, 1982 (post prayer-book revisions) and the 2018 canon: the most recent version of canon describing membership in 2018:

1979 Version	1982 Version	2018 Version
<p>Sec. 1. All persons who have received the Sacrament of Holy Baptism with water in the name of the Father, and of the Son, and of the Holy Ghost, and whose baptism has been duly recorded in this Church, are members thereof.</p>	<p>Sec. 1 (a) All persons who have received the Sacrament of Holy Baptism with water in the Name of the Father, and of the Son, and of the Holy Spirit, whether in this Church or in another Christian Church, and whose Baptisms have been duly recorded in this Church, are members thereof.</p> <p>(b) Members sixteen years of age and over are to be considered adult members.</p> <p>(c) It is expected that all adult members of this Church, after appropriate instruction, will have made a mature public</p>	<p>Sec. 1 (a) All persons who have received the Sacrament of Holy Baptism with water in the Name of the Father, and of the Son, and of the Holy Spirit, whether in this Church or in another Christian Church, and whose Baptisms have been duly recorded in this Church, are members thereof.</p> <p>(b) Members sixteen years of age and over are to be considered adult members.</p> <p>(c) It is expected that all adult members of this Church, after appropriate instruction, will have made a mature public affirmation of their faith and commitment to the responsibilities of their Baptism and will have been confirmed or received by the laying on of hands</p>
<p>Sec. 2. All baptized persons who shall for one</p>	<p>Sec. 2 (a). All members of this Church who have</p>	

<p>year next preceding have fulfilled the requirements of the Canon, "Of the Due Celebration of Sundays", unless for good cause prevented, are members of this Church in good standing.</p> <p>Sec. 3. All such members in good standing who have been confirmed by a Bishop of this Church or a Bishop of a Church in communion with this Church or have been received into this Church by a Bishop of this Church, and who shall, unless for good cause prevented, have received Holy Communion at least thrice during the next preceding year, are communicants in good standing.</p>	<p>received Holy Communion in this Church at least three times during the preceding year are to be considered communicants of this Church.</p> <p>(b) For the purposes of statistical consistency throughout the Church, communicants sixteen years of age and over are to be considered adult communicants.</p> <p>Sec. 3. All communicants of this Church who for the previous year have been faithful in corporate worship, unless for good cause prevented, and have been faithful in working, praying, and giving for the spread of the Kingdom of God, are to be considered communicants in good standing.</p>	<p>by a Bishop of this Church or by a Bishop of a Church in full communion with this Church. <i>Those who have previously made a mature public commitment in another Church may be received by the laying on of hands by a Bishop of this Church, rather than confirmed</i></p> <p>Sec. 2 (a). All members of this Church who have received Holy Communion in this Church at least three times during the preceding year are to be considered communicants of this Church.</p> <p>(b) For the purposes of statistical consistency throughout the Church, communicants sixteen years of age and over are to be considered adult communicants.</p> <p>Sec. 3. All communicants of this Church who for the previous year have been faithful in corporate worship, unless for good cause prevented, and have been faithful in working, praying, and giving for the spread of the Kingdom of God, are to be considered communicants in good standing.</p>
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Final Comment

From a brief historical survey, it is clear that the Church's understanding, let alone its formal definitions, of membership have been constantly evolving. Underlying this development, and reflected in the Canons definition of membership, are larger historical, social, liturgical, and theological changes in the life of the church. Canonical language, phrasing, and instruction regarding membership has also changed to create a shared understanding of membership among different Diocese and their canons, as well as bring ease among clergy in understanding the parameters surrounding membership in The Episcopal Church. As this Committee examines the topic of membership, we are doing so in lockstep with previous members of General Convention who have sought to ask and answer the question: What is the state of membership in the Church?

Present State of Membership

The 1981 edition of *Annotated Constitution and Canons of the Episcopal Church* recounts an attempt at 1961 General Convention to define the terms “member” and “communicant in good standing.” Seeking to end confusion created by Dioceses and their own canonical meaning. Not only were these new definitions met with criticism, but it seems that confusion regarding membership has only grown. Further, it seems that these definitions are no longer serving the needs of the Church. To quote the above mentioned now forty year old book:

“The definitions now in place do not appear to define and recognize present standards of Church support and are not now meaningful in measuring Church membership and participation.”

While substantive revisions were made to the canon pertaining to membership in 1982 to reflect the theological and liturgical developments of the 1979 Book of Common Prayer, much has changed in the life of the church over the past forty years. Let alone the last two years since the start of the pandemic.

From a brief historical survey, it is clear that amendments and revisions to the canon dealing with membership have all been shaped by three things: theological and liturgical reforms; a desire for uniformity and pragmatism; and historical and social developments. Over the last forty years, and just these last two years, we have seen major shifts in these three arenas. From conversations on prayer book revisions; to shifts in denominational loyalty and membership decline; to geographical and cultural diversity in the Church; to the on-going impact of the pandemic on worshipping communities, there is a lot that’s happened and still happening that beckons us to reexamine membership in The Episcopal Church.

Information from Conversations with Deputies

From conversations with members of the House of Deputies, it's clear that our present definitions and understandings of membership as they appear in the canons do not play a significant role in the day-to-day life of a parishes. A lay deputy and full-time church employee from Delaware shared that in his experience he thinks of the criteria for what the canons define as a communicant in good standing - All communicants of this Church who for the previous year have been faithful in corporate worship, unless for good cause prevented, and have been faithful in working, praying, and giving for the spread of the Kingdom of God, are to be considered communicants in good standing.

CANON I.17.3 - when assisting in vestry recruitment. As it is common that the phrase "communicant in good standing" not only appears in the canons of the Church and individual Dioceses, but also in parish by-laws to define whose names may appear in the parish's rolls at a congregation's annual meeting or who is eligible to serve on vestry. Further, as pointed out by a deputy from Virginia, many Dioceses to this day have a system of representation at their annual convention that gives extra seats to parishes that exceed a certain membership level (baptized members and/or communicants in good standing). The present definitions of membership, and its three tier system of baptized members, communicants, and communicants in good standing seem to only have relevance when dealing with church business: vestry and parish meetings, Diocesan conventions and boards of governance, and General Convention and Executive Council.

Outside of matters dealing with church governance, deputies shared that their parishes are more aware of canonical definitions when it comes time to fill out the parochial report. As it is required to report the the number of baptized members - All persons who have received the Sacrament of Holy Baptism with water in the Name of the Father, and of the Son, and of the Holy Spirit, whether in this Church or in another Christian Church, and whose Baptisms have been duly recorded in this Church, are members thereof.

CANON I.17.1 (a) - and communicants in good standing.

While the parochial report provides instructions and cites the canonical mandate, there is still a great deal of confusion among parish leaders. A deputy from Oregon shared that it is a hard report to fill out accurately. He writes "the question that trips us up the most is the question on membership... The report is very specific about people that are baptized. Unfortunately we just don't have that information on everyone. If that piece was re-structured, the report would not be so bad. I hate feeling that we aren't giving absolutely accurate information, but

the best we can do is guess.” The pandemic has increased the difficulty around this language as many individuals were not able to meet the communicant criteria as outlined in the canons - All members of this Church who have received Holy Communion in this Church at least three times during the preceding year are to be considered communicants of this Church. CANON I.17.2

While the pandemic created a new problem for our definition of membership in the Church, it also revealed many of its existing flaws; flaws that have existed for decades. Not only can it be difficult to sort out who's a baptized member and who's a communicant in good standing, but in many parishes the information needed to report this accurately is simply not there. Not only are letters of transfers not sought out by lay members when transferring or moving parishes, but changes in society and our present religious landscape have created situations that were not previously considered or imagined. For example, people attending church, or multiple churches, for nearly two years from the comfort of their home; individuals attending parishes and purposely not seeking to transfer their membership; and for many who were not raised in The Episcopal Church, specially those not raised in liturgical traditions, any formal baptismal records may simply be non-existing.

While it can be argued that the canons offer some wiggle-room for some of these situations, these situations are no longer a rare exception to the norm. Changes in church and culture, especially in a post-pandemic world, requires us to think creatively on what it means to be a present and future, active and engaged, member of The Episcopal Church. The Church should not simply change our present definitions and understandings of membership because the world around us is changing, but because the Church should be constantly evolving.

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TASK FORCE ON TRANSLATION AND INTERPRETATION

Members

The Rt. Rev. Lucinda Ashby, Chair	El Camino Real, VIII	2024
The Rev. Roberto Maldonado-Mercado, Vice-Chair	San Diego, VIII	2027
Amy Waltz-Reasonover, Secretary	Texas, VII	2027
The Rt. Rev. Lloyd Allen	Honduras, IX	2027
The Rev. Gabriel Atem	Utah, VIII	2024
Ms. Bernice David		2024
Ms. Iris DiLeonardo		2024
Sra. Blanca Echeverry	Colombia, IX	2027
The Right Rev. Hector Monterroso	Texas, VII	2027
Rev. Nathanael Saint-Pierre		2027
The Rev. Irene Tanabe	Olympia, VIII	2027
	Convocation of Episcopal Churches in	2024
The Rt. Rev. Pierre Whalon	Europe, II	
Mr. Kurt, Ex Officio	New York, II	
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	

Acknowledgements

The Taskforce wishes to extend special thanks to Diane Lynch and Cecy Alomia who have been serving as interpreters for our meetings. We also thank the Rt. Rev. Scott Hayashi and the prior Taskforce that laid the foundation for our work by drafting the Translation and Interpretation policies for Executive Council (G0035, April 23, 2022).

Mandate

2022 - A024 Create a Task Force on Translation and Interpretation

Resolved, the House of Bishops concurring,

That the 80th General Convention, pursuant to Joint Rule IX.22, create a Task Force on Translation and Interpretation, whose mandate includes, but is not limited to, (1) development of a working strategy and criteria for determining and prioritizing the types of materials (media releases, resources, reports, etc.) pertaining to church life to be translated and meetings related to governance to be interpreted and into which languages; (2) establishment of criteria for assuring the quality of translations and interpretation, employing dynamic equivalence, and establish procedures and criteria for hiring professional translators and interpreters to assure high-quality translations and interpretations; (3) consultation with non-English speaking dioceses, jurisdictions, and area missions about their needs and priorities for translations and interpretation; and (4) recommendation of funding levels necessary to implement the strategy; and be it further

Resolved, That the task force begin its work no later than January 1, 2023, with the task concluding its work at the conclusion of the 82nd General Convention, unless its mandate is extended by the 82nd Convention; and be it further

Resolved, That the task force report annually to Executive Council and provide an interim report to the 81st General Convention and a final report with recommendations to the 82nd General Convention; and be it further

Resolved, That the membership of this task force be appointed by the Presiding Bishop and the President of the House of Deputies and include up to three Bishops appointed by the Presiding Bishop for five-year terms, with special consideration given to inclusion of Bishops from non-English speaking dioceses and jurisdictions; up to three Clergy and up to three Lay Persons appointed by the President of the House of Deputies for five-year terms, with special consideration given to inclusion of persons from non-English speaking dioceses, jurisdictions, and mission areas; up to two members of the Standing Commission on World Mission (SCWM) appointed by the SCWM; and one member of the Standing Commission on Liturgy and Music (SCLM) appointed by the SCLM; and be it further

Resolved, That the Executive Officer of General Convention appoint a member of the staff from the General Convention Office and the Presiding Bishop appoint a member of staff from the Language Services Department of the Office of Communications to serve as consultants to the task force; and be it further

Resolved, That \$90,000 be budgeted for the implementation of this resolution, of which \$30,000 would be allocated to the first triennium of the task force's work.

Summary of Work

The 80th General Convention charged this Taskforce with developing procedures to implement Resolution A024 whose mandate includes: developing a working strategy for determining and prioritizing the types of materials to be translated and meetings to be interpreted, criteria for qualities of translation and interpretation and into which languages, consultation with dioceses and areas that are non-English-speaking, and recommendation for funding levels to implement these strategies. The Taskforce is set to conclude its work in 2027.

The charge given this Taskforce is broad and complex. In order to address the needs and issues of Translation and Interpretation, the Taskforce is very clear that “translation” refers to written documents, while “interpretation” refers to spoken words. While written documents are translated into standardized language, interpretation allows for linguistic variations—regionalisms and dialects.

The Taskforce has met twice in-person and three more times virtually thus far during this biennium. In our meetings we have accomplished the following:

- Developed a matrix to determine the types of materials to be translated, the criteria for the level of expertise of the translation, and why the translations is necessary. We are clear that liturgical documents are not the purview of this taskforce at this point, although we note that they require professionalism and are field specific—requiring the expertise of a liturgist.
- Sent a survey to assess what languages are needed for translation. We note that the mandate from the Executive Council focuses on English, Spanish, French, Haitian Creole and Mandarin. However, we are aware that there are more languages spoken and read in The Episcopal Church. To that end, in May and June of 2023, we sent a survey to all dioceses to ask about languages spoken, languages needed for worship, other materials needed in specific languages. We received 169 total responses from a variety of dioceses, which while helpful, did not yet enable us to determine the actual need of smaller language groups that may be scattered in different places. For example, there may be small group that needs translation in Tagalog in one place, and another small group far away with the same need; yet together, they may comprise a significant language group. The question remains for us as to how to access that information throughout the church.

An ongoing challenge is to understand the ways in which translation and interpretation needs are funded within the budget, and the expense of translating specific materials. For example, we learned that to translate the General Convention Blue Book into Spanish costs @\$125,000. Additionally, we have become aware that some requests for Language Services are line items in the overall budget, while others are department specific and included in that departmental budget. It is clear that some work needs to be done to ensure that actual expenses for translation and interpretation can be easily tracked.

While the technical aspects of our work are evident, broader questions are being raised. These include questions of inclusion and justice which are at the very heart of our baptismal covenant.

The following questions need to be considered:

- How does one measure and determine which translations into which languages are more important?
- What issues of race and class inform decisions about translation and interpretation?
- How do we continue to assess language needs, determined by immigration patterns in our world?
- How do we address the question of mutuality so that materials (educational materials, for example) are shared across languages and cultures?
- What plan needs to be in place so that The Episcopal Church continues to evaluate budgeting and the work of Language Services is fluid and adaptive?

The work of the Taskforce is broad in scope and grounded in Baptismal Covenant. The question that we need to continue to ask ourselves is: what is Jesus doing and what will Jesus continue to be doing in this work that is invaluable to building up the Body of Christ (Ephesians 4:12)?

Budget Request for Language Services for the 2025-2027 Triennium: \$1,500,000

Budget Request for the work of the Taskforce on Translation and Interpretation: \$50,000

TASK FORCE TO ADVISE THE CHURCH ON DENOMINATIONAL HEALTH PLANS

Members

The Rev. David Sibley, <i>Chair</i>	Spokane, VIII	2024
The Rt. Rev. Susan Brown Snook, <i>Vice-Chair</i>	San Diego, VIII	2024
Mr. Luke Taylor, <i>Secretary</i>	Ohio, V	2024
Mr. Frank Armstrong	The Church Pension Group	2024
The Rt. Rev. Mark Hollingsworth	Ohio, V	2024
The Rev. Everett Lees	Oklahoma, VII	2024
Canon Kathryn McCormick	Mississippi, IV	2024
Ms. Joan Ogden	Utah, VIII	2024
Ms. Diane Pollard	New York, II	2024
The Rev. Phillip Shearin	Western Massachusetts, I	2024
Mr. Bill Thompson	Connecticut, II	2024
The Rev. Sandy Webb	West Tennessee, IV	2024
The Most Rev. Michael Bruce Curry, <i>Ex-Officio</i>	North Carolina, IV	2024
Ms. Julia Ayala Harris, <i>Ex-Officio</i>	Oklahoma, VII	2024

Changes in Membership

The Rev. Phillip Shearin resigned from the Task Force in April of 2023 and was not replaced.

Representation at General Convention

Deputy David Sibley and Bishop Susan Brown Snook are authorized to receive non-substantive amendments to this Report at the General Convention.

Acknowledgements

The Task Force wishes to offer its thanks to Bonnie Albritton and Ari Loiben of Lewis and Ellis Actuaries and Consultants for their thorough and outstanding review of the Denominational Health Plan within a condensed time frame, which provided the foundation for our recommendations to the church. The staff of the Church Pension Group, especially John Servais (SVP of Benefits Policy and Design), Laurie Kazilionis (SVP of Benefits Relationship Management), and Damon Tutein (Business Analyst & Vendor Management) worked hand in hand with the Task Force throughout our work, both educating us on the state of the Denominational Health Plan, enabling Task Force members to receive feedback and make presentations to Diocesan Administrators, receiving responses from vendors when soliciting

proposals for actuarial review, and for facilitating Lewis and Ellis' review . We finally offer our thanks to the Presiding Officers, to the Executive Council, and to the General Convention Office for the ongoing facilitation our work, most especially in securing resources to allow for meaningful study of the DHP, and data-driven recommendations for its future support of our church's ministry.

Mandate

2022–D034 Create a Task Force on the Denominational Health Plan

Resolved, that there shall be a Task Force to Advise the Church on the Denominational Health Plan...

The Task Force shall review the structure and offerings of the Denominational Health Plan, in consultation with the Church Pension Group staff, with special attention to the cost of premiums, and report back to the 81st General Convention a list of options to reduce health insurance costs across the church, including an examination of the impact of individual faith communities opting out of the Denominational Health Plan, with a full explanation of the reasoning for and costs and benefits of each option. The 81st General Convention shall consider the options in deciding whether to modify the mandate given to the Denominational Health Plan in Resolution 2009-A177.

The members of the Task Force shall be appointed by the Presiding Officers, and shall consist of: one member of the Church Pension Group Board of Trustees; one member of the Church Pension Group Client Council; one Church Pension Group staff member who is expert in the health care issues addressed by the Denominational Health Plan; two members of Executive Council; two Bishops who serve as at-large members of the Task Force; four Clergy or Lay People who serve as at-large members of the Task Force; and two members who are experts in health care and insurance finance issues.”

Executive Summary

Among the most acute pressures faced by the domestic dioceses, congregations, and faith communities of The Episcopal Church is the precipitously rising cost of securing quality health insurance benefits for lay and clergy employees. For many communities in The Episcopal Church, the single most salient factor in choosing whether to offer employment on a basis of over 1,500 hours annually is the cost of securing mandatory health care coverage through the Denominational Health Plan (DHP) via its designated benefit structure, The Episcopal Church Medical Trust.

The Denominational Health Plan was established in 2009 as the mechanism by which health care and related benefits would be secured for eligible clergy and lay employees of this Church, together with their eligible dependents, at a more affordable price than either the small business insurance market, or the individual insurance market (which after the passage of the Affordable Care Act in 2010, would commonly become known as “exchanges”). Participation in DHP is mandatory for all parishes, missions, and other ecclesiastical organizations or bodies subject to the authority of this Church. Since its creation fifteen years ago, the General Convention has repeatedly considered concerns about the affordability and availability of DHP plan offerings through four separate resolutions, including the resolution establishing this Task Force.

The Denominational Health Plan covers participants located in the United States only; because health care systems vary widely from country to country, Church Pension Group has adopted a different strategy for non-US participants. The Fund for Medical Assistance (FMA) was created for eligible non-US dioceses and reimburses participants for qualified medical expenses not otherwise covered by public or private insurance. The non-US dioceses that are eligible to participate in the FMA currently include the Dioceses of Colombia, the Dominican Republic, Ecuador Central, Ecuador Litoral, Haiti, Honduras, Micronesia, Puerto Rico, Taiwan, Venezuela, and the British Virgin Islands. Because these non-US dioceses are not eligible to participate in the DHP, this report focuses on healthcare within the United States.

In the shortened biennium, The Denominational Health Plan Task Force undertook a careful, targeted, yet thorough review of the DHP, its structure, offered plans, and its status. We began with a thorough briefing on the DHP from the Church Pension Group, and on health insurance coverage at large from the Health Care Actuaries on the Task Force.

In considering the depth of analysis needed to make credible recommendations to the church, the Task Force requested that the Domestic and Foreign Missionary Society and Church Pension Group jointly fund a targeted independent study by an outside actuarial firm of DHP’s current structure, funding, and plan offerings. Special attention was offered to any cross-subsidization of health insurance costs within the plan by benefit level, coverage tier, geography, mandatory vs. voluntary group participation, ordination status, and eligibility for Medicare benefits. After a multi-bidder request for proposal process, Lewis & Ellis Actuaries and Consultants were unanimously selected to undertake the review. Our conclusions are based in major part upon their excellent work.

We have found that The Church Pension Group has effectively implemented cost-saving strategies in line with the requests and mandates given to it by the General Convention. Despite these strategies, some inherent features of The Episcopal Church's group mean that overall costs of the plan are higher than plans intended for the general population. For instance, the higher average age of the TEC covered group as compared to the general population means that overall costs are inherently higher, since health care expenses on average increase as people age. In addition, plans currently offered by the DHP include some extremely generous benefit-rich plans that are not available to many people outside TEC. In fact, the DHP offers significantly richer coverage at its highest coverage levels than any of our denominational peers, including the Evangelical Lutheran Church in America (ELCA), the United Methodist Church (UMC), and the United Church of Christ (UCC). Our richest benefit levels offered at the PPO100 and PPO90 tiers through Anthem and Cigna (and richer even than most ACA exchange and small business market "platinum" level plans) - comprise 41% of members covered and are significantly subsidized by members receiving coverage at almost all other coverage levels. The rich benefits of these high-end plans increase the costs to all DHP participants that is not recouped by higher insurance rates charged to the participants in those benefit-rich plans.

However, past General Convention actions also have unintentionally raised costs. In a well-intentioned attempt to achieve equitable pricing, past Conventions adopted resolutions that asked the Church Pension Group to price DHP plans as much as possible to a national average. However, health care costs vary dramatically across the country, as does cost-of-living; a functional result of the Convention's action was to artificially subsidize the cost of health care in high-cost areas – areas that are usually (but not always) more resourced – with funds paid into the medical trust through insurance rates from lower-cost areas with lower cost of living. As a result of this subsidization, a church employing a young participant with a family in a relatively low-cost area pays a significantly higher health care insurance rate than would be available on the open-market healthcare exchanges. This imbalance results in inequity to the employing congregation and may even discourage churches from calling young clergy with families, because of the high health care costs that come with family coverage.

Some have asked why, in that case, a church should not be allowed to simply opt out of DHP coverage and buy their health insurance on the open market. The problem is that if all the employees who could get cheaper coverage elsewhere by virtue of their age, location, and other factors opt out of the plan, that leaves the plan with only more-expensive participants, driving up the cost per participant still further. As this cycle continues, with more participants opting out as prices increase, it becomes what is known as a "death spiral," resulting in financial unsustainability, and eventually in the loss of the whole plan. The ethical value underlying the DHP is that we care for each other by entering a health care pool together, sharing each other's burdens.

So what is to be done? A significant portion of our insured population is eligible for coverage through the Medicare Small Employer Exception, which allows Medicare to serve as the primary coverage for people 65 or older who work in institutions with fewer than 20 full and/or part-time employees. Given that many Episcopal communities meet the threshold for Medicare-primary coverage, greater efforts to encourage Medicare-eligible individuals to move to Medicare-primary coverage would provide a significant benefit to the whole church – both lowering the cost of supplemental coverage to the individual and/or institution, and creating a significant reduction of costs to the Denominational Health Plan.

Finally, past actions of the whole church have meant that some indigenous clergy have been priced out of the DHP. As discussed further below, our proposals are intended to provide just and equitable coverage for indigenous clergy and lay employees of The Episcopal Church. Our failure to provide the same benefits to our indigenous employees as we do to others is an injustice that violates our church's commitment to Becoming a Beloved Community and must be corrected.

In weighing the differing imperatives for coverage across the church and the church's moral obligations to its lay and clergy employees, the realities of the DHP as structured at present revealed by our actuarial study, extensive feedback from the whole church, and discussions in consultation with the Church Pension Group, we recommend the General Convention urge the following changes to the Denominational Health Plan:

- Make self-sufficient, to the extent possible, the coverage offered to employees and dependents at each benefit level – using the coverage offered by our denominational peers as a point of comparison to ensure that our employees receive appropriate coverage.
- Adopt additional markers to define “equitable” cost sharing across the church - including adding new rating factors in setting insurance rates that consider both the prevailing cost of health care in each region, and each community's resourcing and ability to pay.
- Change the rating structure to create a church-wide subsidy within the DHP to ensure that the Navajoland Area Mission, and the sponsored dioceses of Alaska, North Dakota, and South Dakota, can access affordable quality coverage outside of the Indian Health Service (IHS) for indigenous lay and clergy employees and dependents.
- Increase outreach efforts toward encouraging greater adoption of the Medicare Small Employer Exception among employees 65 and older by educating the church as to its benefits for both individuals and the whole church.
- Focus existing outreach efforts on the availability and use of Consumer Directed Health Plans (CDHPs) and Health Savings Accounts and providing resources by which covered communities can transition from more expensive PPO plans to less expensive CDHP plans in a way that works for employees.

Summary of Work

The DHP Task Force conducted its work over several meetings, projects, and presentations to the wider church throughout 2023:

- January 30, 2023 – Online
 - *Organizing Meeting and Development of Work Plan*
- February 24, 2023 – Online
 - *CPG Presentation and Q&A on Denominational Health Plan History and Structure*
- April 27-29, 2023 – In Person
Maritime Center, Linthicum Heights, MD
 - *Values for Work*
 - *Actuary Presentation on Actuarial Science, DHP Questions, Avenues of Inquiry*
 - *Group Deliberations and Beginning of Study Request for Proposal (RFP)*
 - *Meeting with Executive Council – CPG Memorandum of Understanding Committee*
- May-June 2023 – Asynchronous Work
 - *Microsoft Teams Collaboration on Study Request for Proposal*
- July 27, 2023 – Online
 - *Review of RFP Responses, Awarding of Study to Lewis and Ellis Actuaries*
- September 25-27, 2023 – In Person (Rev. David Sibley & Rev. Sandy Webb)
Midtown Hilton, New York, NY
 - *Presentation to Episcopal Benefits Administrators' Conference*
 - *Feedback/Survey of Episcopal Benefits Administrators*
- November 2023 – Asynchronous Work
 - *Churchwide Survey on the Denominational Health Plan*
- November 13, 2023 – Online
 - *Actuarial Presentation and Q&A with Lewis & Ellis*
- November 14, 2023 – Online
 - *Churchwide Listening Session on the Denominational Health Plan*
- November 29, 2023 – Online
 - *Deliberation and Adoption of Recommendations to the Church*

In addition, the Chair and Vice-Chair of the Task Force collaborated with and presented to the Presidents of their respective Houses of the General Convention, to the Executive Council Joint Standing Committee on Finances for Mission, Church Pension Group Executives and Team Members, and Lewis & Ellis Actuaries and Consultants, the contracted firm for the Actuarial Study of DHP.

Values & Aims

The DHP Task Force sought to approach our work in ensuring affordability of health benefits for the church by expressing the values held by members of our Task Force and the church at large. This was to ensure that the recommendations made by the Task Force would be grounded in not only a zeal for pure efficiency and cost-cutting that is common in the secular world, but instead in our hopes and aspirations for providing health care to the church. The Task Force's expressed values were:

1. The Episcopal Church's witness matters, and we need to provide for long-term sustainability for our congregations and dioceses; health benefits are a major present challenge to sustainability for many communities.
2. We need to provide quality health and wellness for our employees and their dependents, and they need to be accessible within their contexts.
3. We need to support dioceses and congregations that have fewer resources in obtaining coverage that is priced appropriately to their context.

Similarly, we adopted aims for work to help shape our inquiry into the DHP and shape our deliberations and recommendations to the church:

1. Provide the 81st General Convention with a "menu" of recommendations that may provide meaningful and practical cost control in DHP.
2. Do our work with the depth of study, credibility, and explanation that the church needs to fully digest necessary changes to DHP.
3. Provide both input by and continuing education to church consumers about the costs and benefits of each recommendation we make.
4. Provide both input by and continuing education to administrators and those in a position now to make decisions that lower costs.

Background & Prior Action By General Convention on DHP

The Denominational Health Plan was established by the 76th General Convention in Resolution 2009-A177, which set the underlying principles for DHP and amended Canon I.8 of the *Canons of The Episcopal Church* to make participation in the DHP mandatory for all domestic dioceses, parishes, missions, and other ecclesiastical organizations or bodies subject to the authority of this church, and for all clergy and lay employees working a minimum of 1,500 hours per year.

Mandatory participation in the DHP ensures an adequate pool of insured to properly manage the risk and cost associated with operating a VEBA (a Voluntary Employees' Benefit Association), the legal and regulatory structure through which the DHP operates. The Denominational Health Plan is a self-insured entity – insurance coverage costs paid into the Medical Trust by covered communities in turn pay all member health claims and administrative costs with running the DHP. Re-insurance policies have historically been held by the Medical Trust to backstop the DHP against unanticipated shock claims and/or catastrophic losses. A prudent decision to end re-insurance coverage is scheduled to end in 2024, CPG will carefully monitor the potential need for resuming re-insurance.

By 2012 – only 3 years after the DHP was established – concerns arose as to the disparity of health care costs among the dioceses of the church. The 77th General Convention adopted resolution 2012-B026, which urged the Episcopal Church Medical Trust (and by extension, the Church Pension Group) to “explore alternative strategies to arrive at a more equitable sharing of health care premium costs, including alternative means of achieving such equity.” Testimony in Legislative Committee at the 77th General Convention and debate on the floor of each house focused on a churchwide desire to achieving a single national rate in providing coverage at each benefit level.

While well intentioned, this approach was (and still remains) flawed as a means of providing equitable access to health care. Health care costs vary dramatically across domestic dioceses, and from state to state. While not universal across the country, locations with higher costs of living by and large have higher health care costs. As such, the General Convention's action created a *de facto* subsidy for high-cost areas with the coverage costs paid by low-cost areas.

As such, low-cost markets began to see the rates for their coverage in DHP rise above the rates in their markets. While resourcing and capability to pay higher rates for insurance in the church does not correspond 1:1 with cost of living – notable exceptions, such as South Dakota and Alaska do exist – in large part, it was the parts of the country with most access to institutional resources that benefited from the changes enacted in 2012-B026.

By 2015, the problems continued to be visible to the wider church, yet the solutions were not evident. The 78th General Convention considered 2015-D021 which noted the “disproportionate financial burden” on parishes in the Midwestern United States; however, it also sought to fix that problem with a contradictory resolve that would have made the situation worse - by instituting a “plan with minimal variance in premium costs from diocese to diocese, thereby reducing cost differences... between dioceses... of The Episcopal Church.” As noted previously, while some exceptions exist, the net result of such approach would have been to create a subsidy of high-cost, high-resource areas at the expensive of lower-cost, lower resource areas. While the joint legislative committee honed the resolution to simply request further study, a floor debate in the House of Deputies restored a request for an opt out provision; floor debate in the House of Bishops removed it. The resolution ultimately died in non-concurrence upon adjournment.

In 2018, the 79th General Convention acted to ensure each diocese had access to multiple networks for insurance care (“health insurance providers”), and provided an opt-out for any diocese in which only one health insurance provider is available under the Denominational Health Plan when “the availability of only one provider would have a material negative impact on the diocese’s employees, congregations, new recruitment, or overall well-being, that diocese will be permitted to seek other insurance options outside of the Denominational Health Plan” in 2018-C023. A challenge in the interpretation of the resolution exists in the gap that exists between the mere existence of a network’s presence in a given area with the lived reality of finding an available network provider. While a network may be able to take clients within a given area on paper, the number of providers may be limited or extremely distant. At this time, the Cigna and Anthem networks are offered throughout the DHP; Kaiser Permanente’s network is also offered in certain locations in the West.

By 2022, pressure on the DHP from local congregations had grown acute – and ultimately led to the formation of this Task Force. The 80th General Convention considered 2022-D034, which as submitted would have revised the principles associated with the DHP to allow for an opt-out from the DHP when premiums for similar coverage on local markets were 20% less than DHP rates. The resolution was amended in committee to create this task force, and carried both Houses, resulting in the creation of this Task Force and its attendant report and resolutions.

Actuarial Review of the Current State of the Denominational Health Plan

To undertake a review of the current function of the Denominational Health Plan and offer recommendations to the General Convention in lines with the values of the church, the Task Force quickly recognized the importance of having highly qualified “fresh eyes” review the DHP. With equal joint support from DFMS and CPG, the Task Force presented a Request for Proposal to actuarial firms with no prior engagement with the Denominational Health Plan, and asked for review of the following components of DHP:

1. Plan Benefit and Design

- How do plan offerings align with the broader market for health care in the United States?
- How do plan offerings align with benefit plans offered by other peer denominations?

2. Benefit Pricing and Pricing Structure

- How is risk actually shared among participants in the Denominational Health Plan?
- What is the relative value of each dollar paid to obtain coverage, and does subsidization occur within the plan by:
 - Network Choice (i.e. Anthem, Cigna, or Kaiser)
 - Benefit Option (i.e. PPO100, PPO90, CDHP-15, Kaiser)

- Coverage Tier (ie. Employee, Employee+1, Employee+Family)
- Region and Geography
- Mandatory vs. Voluntary Participation in DHP
- Clergy or Lay Status
- Pre-65 and Post-65 Employees

3. *Cost Management*

- What specific steps may be taken to help contain costs without compromising care?

4. *Reserves and Surplus Levels*

- Does the DHP's balance sheet reflect broadly accepted understandings of appropriate levels of reserves held to pay claims?

Six total responses were received to the Request for Proposal, and the Task Force unanimously selected the proposal presented by Lewis & Ellis Actuaries and Consultants as the proposal that most properly responded to our allotted budget and the scope of review needed, in addition to the time-pressure of a shortened biennium between conventions.

Central to the healthy function of the DHP is sharing risk. By paying insurance premiums into a common pool, members share their financial resources to create a large enough umbrella to weather and bear the costs of any storm that may occur when they need health care.

When functioning well, the umbrella is both wide enough to cover the costs that may be incurred by a pool's members for their health care costs, while also narrow enough to assure that the rates paid to underwrite each member are affordable. Maintenance of a proper balance between these two risk imperatives – holding sufficient funds to cover all costs while not charging rates so high that members seek to leave the plan - requires actuarial expertise, a deep knowledge of the needs of the client base, and a careful evaluation of the risk each participant and group brings, and how they affect the whole.

In insuring a group, common rating characteristics for a group include:

- Age
- Gender
- Health Status (i.e. experience in prior claims)
- Tiers of Coverage
- Geography
- Group Size

Inherent in any group plan is the reality of designed vs. unintended subsidization of health costs across its membership. While it might seem the larger the covered group, the lower the cost, a truism holds that about 15% of members generally drive about 80% of costs regardless of group size. Simply adding more members doesn't change the overall actuarial equation of risk management. All participants will choose the benefit richness they think is best for their risk. Participants who believe their personal medical risk is higher will choose the richest benefit plans; this choice drives up costs for everyone as payouts are correspondingly high. This "adverse selection" effect is well known in the insurance industry. To be clear, no insurance plan exists without some necessary subsidy. But countering unintended subsidization through benefit design and rate-setting can help ensure that the plans offered are as affordable as possible.

In this report, we present our findings specifically on key drivers of higher insurance rates, and meaningful options for General Convention action to reduce costs without compromising care. In the review of DHP, Lewis and Ellis found, and the Task Force agreed, that unintended subsidization is occurring with the DHP across three key categories: by benefit option, by region and geography, and between Pre-65 and Post-65 Employees.

The report presented to the Task Force by Lewis & Ellis is provided in its entirety as an appendix to this report and reprinted with their permission for the use of the Convention in its deliberations.

Countering Unintended Subsidization by Benefit Offering

Over 40% of DHP participants have coverage through a PPO100 or PPO90 plan in the Anthem and Cigna networks. PPO100 and PPO90 plans are considered "platinum plus" level coverage, with very few out of pocket costs. None of our denominational peers, and indeed none of the denominations researched by Lewis and Ellis, offer plans of comparative richness to the Anthem/Cigna PPO100 plan; a few, but not all, offer coverage akin to the Anthem/Cigna PPO90. These plans are all significantly more generous than the counterparts that provide coverage in the secular world through the small business and individual markets

Figure 1: Comparison of Plans offered Across Sibling Denominations

Denomination	TEC / ECMT PPO100	ELCA / Portico Platinum+	UCC Plan A	UMC / Wespath B1000
Richest Plan Deductible (Individual / Family)	\$0 / \$0	\$550 / \$1,100	\$300 / \$600	\$1,000 / \$2,000
Richest Plan Out of Pocket Max (Individual / Family)	\$2,000 / \$4,000	\$3,400 / \$6,800	\$2,000 / \$4,000	\$5,000 / \$10,000
Richest Plan Coinsurance	0%	20%	20%	20%

The PPO100 and PPO90 plans are carrying combined claim and administrative loss ratios of 111% and 102% respectively – meaning that the costs incurred by each plan exceed the income from rates paid to obtain coverage by 11% and 2%, and those holding other plans through the medical trust subsidize the true cost of coverage at this level. Our actuarial study calculated what change in rate would be required to remove the subsidy from other plans. Assuming no change to the overall income, the calculation showed that to remove the subsidy from participants in other plans, rates of the PPO100 plan would need to increase by 18.2%; rates of the PPO90 plan would need to increase by 9.6%. In pure dollar amounts, these subsidies may amount to as much as \$18 million in costs subsidized by the rates paid by those who *are not* insured in a PPO100 or PPO90 plan.

Figure 2: DHP PPO 100 and PPO 90 Plans & Subsidy

Plan	Anthem/Cigna PPO100	Anthem/Cigna PPO90
Deductible/Coinsurance/Out of Pocket Maximum	\$0 / 0% / \$2,000	\$500 / 10% / \$2,500
Claim & ASO Fees Loss Ratio	111%	102%
Rate % Subsidy from Other Plans	18.2%	9.6%

We recommend that General Convention urge the Church Pension Group to take steps to make each benefit level self-sufficient and self-funding to the extent that is possible and appropriate, using the plan offerings of our denominational peers as a guide to set appropriate benefit richness. Consistent with our ethical and moral convictions, we can use the benefit offerings of our sibling denominations to ensure our plans are rich enough to ensure productive ministry (especially in areas where benefits are among the primary means of compensation owing to low salaries) while not so over-rich as to result in shifting of claim costs from the richest plans to those enrolled in other plans within church. Very often, lay and clergy employees in less-rich benefit tiers are enrolled in these benefits precisely because they cannot afford the PPO100 or PPO90 plans – so it is critical to ensure that these members are not over-subsidizing medical costs in richer benefit options that they cannot afford themselves.

Countering Unintended Subsidization by Region

Medical costs vary dramatically by location across the country, as becomes readily evident when considering Health Care Spending Per Capita in 2020, as presented by the KFF's *State Health Facts*.

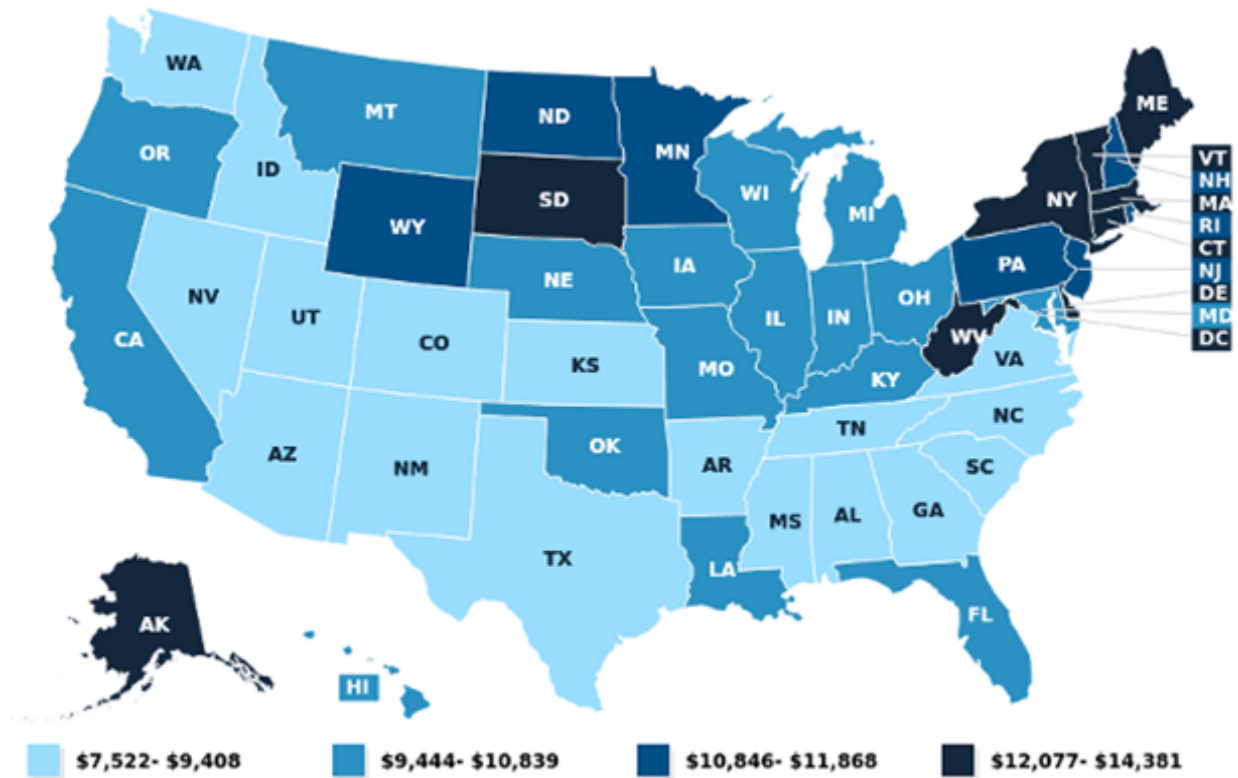


Figure 3: Health Care Spending Per Capita, 2020

Prior General Convention action asked CPG to try to achieve equitable rate costs across the country, without regard to the actual market cost of health care in each area. Even before actuarial analysis, the Task Force was aware that regional subsidization was likely occurring within the DHP.

Lewis & Ellis analyzed the extent of subsidy in the church under the following broad categories of geography:

- Northeast: Provinces I, II, and III
- Midwest: Province V
- South: Provinces IV and VII
- West: Provinces VI and VIII
- Other: Episcopal Service Corps and Episcopal Camps and Conference Centers

Figure 3: Contribution & Claim Relative Value by Geography

	Northeast	Midwest	South	West	Other
Contribution Relative Value	1.00	0.96	0.88	0.94	0.90
Claim & ASO Fees Relative Value	1.00	0.97	0.86	0.84	0.79
Rate Change to Remove Subsidy	2.5%	3.7%	0.4%	-8.2%	-9.5%

The result observed is a functional subsidy of health care by Provinces VI and VIII, Episcopal Service Corps (ESC) programs, and Episcopal Camps and Conference Centers (ECCC) to the rest of the country. Were geographic subsidy removed from the plan, Provinces VI and VIII would have rates drop by 8.2%; ESC and ECCC groups would have rates drop by 9.5%.

Yet the most acute challenge in addressing regional subsidization in the DHP is the uneven distribution of resources across The Episcopal Church. The cost of health care is acutely high as many would expect in places of comparatively high resourcing such as the Dioceses of New York and Long Island – but also in under-resourced dioceses such as South Dakota, West Virginia, and Alaska. Meanwhile, other highly resourced dioceses – such as Texas – benefit from lower health care costs than the national median. Strictly setting insurance rates based on geography and the prevailing cost in each area does not foster the mutual interdependence intended to be created through the DHP.

The Task Force recommends that the General Convention urge CPG to add two new factors, in addition to existing factors, to make rates more equitable across the church. This would take the form of adopting of a counter-balancing “dual mandate” to consider two additional factors when setting health insurance rates:

- the relative ability of each covered community to pay a given rate
- the prevailing cost of comparable coverage within the area covered by each group

Such an added rating mechanism will allow the DHP to generally key the cost of health insurance to cost of living and cost of health care in each location, while also recognizing that the resourcing to pay for health coverage is unequally distributed across our church.

Countering Unintended Subsidization by Age

A simple reality is that as age increases, health care costs increase. Try as we might, there is no action the General Convention can take to reverse the realities of the passage of time, and the reality that older individuals will always have higher claim costs. The DHP is no exception: claims for DHP Primary 65+ members are more than double those of the pre-65 members, but contributions to the plan are only 24% higher.

Figure 4: Effect of Age on DHP Claims and Associated Subsidy

	Pre-65	DHP Primary 65+	Medicare Primary 65+	Total
Member Count	21,178	1,574	442	23,194
Member Distribution	91%	7%	2%	100%
Claim & ASO Loss Ratio	88%	145%	133%	94%
Rate Change to Remove Subsidy	-6.0%	+55.4%	+40.7%	-

Similarly, post-65 employees insured by the DHP overwhelmingly choose the options with the richest benefits. One reason is likely the sheer generosity of our richest plans; another is the relatively recent introduction of Consumer Directed Health Plans (CDHPs) and Portable Health Savings Accounts (HSA) means that those 65 and older have had less time to build a HSA “nest-egg” by contributions, whether made by the employer or the employee.

Figure 5: Plan Selections of Employees by Age

	Pre-65	DHP Primary 65+	Medicare Primary 65+
PPO100/PPO90	40%	56%	73%
PPO80/PPO70	26%	20%	27%
CDHP Plans	26%	17%	0%
Kaiser EPO Plans	8%	7%	0%

The Task Force expressly does not recommend further adjustments to rating mechanisms to remove functional subsidy within DHP by age. We do, however, recommend that the General Convention urge CPG to make intentional efforts to encourage greater adoption of the Medicare Small Employee Exception (SEE). The Medicare Small Employer Exception allows Medicare to serve as the primary payer of medical claims for people 65 or older when they work in an institution with fewer than 20 full and/or part-time employees.

The vast majority of Episcopal communities have fewer than 20 employees, and therefore meet the threshold for Medicare-primary coverage. While CPG cannot mandate, price, or force any 65+ employee to avail themselves of the Medicare Small Employee Exception, new efforts to help employees opt for Medicare-primary coverage would shift the principal cost burden of their care from the DHP to Medicare. In doing so, they would both lower the cost of their Medicare supplemental coverage provided through DHP, and the total cost of claims incurred by the DHP. In so doing, less subsidy would be required from the population under 65 to pay the plan's total claims.

Providing Affordable DHP Coverage to Indigenous Lay and Clergy Employees of our Church

Past actions of General Convention have had the unintended result of pricing some indigenous clergy and lay employees of the church out of the DHP, particularly in the Navajoland Area Mission.

Our failure to provide the same benefits to our indigenous employees as we do to others is an injustice that violates our church's commitment to Becoming the Beloved Community and must be corrected immediately. Past block-granting by the General Convention rested on the assumption that coverage available to indigenous employees and their dependents through the Indian Health Service (IHS) would be sufficient for their health care needs, and thus funds were not provided to purchase DHP coverage. Simultaneously, the General Convention's actions attempting to equalize the cost of health coverage in all regions of the church has caused the price of health insurance to be too high for such less-resourced areas to afford. No action was taken – on either churchwide budget or DHP plan design sides of the coverage funding equation – to be sure DHP plans were accessible to these employees and their dependents.

Government-provided health care through IHS available to indigenous people was indeed once considered to be adequate – but it no longer is. Reliance on such care has resulted in substandard health outcomes for our Episcopal employees. The task force heard impassioned testimony at our open forum asking us to correct this injustice and letting us know that Navajo people have been praying for this plea to be heard for years. Our failure to hear and respond to this request would be a moral stain on our church's witness as God's Beloved Community. This egregious injustice to our colleagues in ministry is an indictment of our own ability to care for our people and must be corrected immediately.

The resolutions we are proposing will allow the DHP to consider the relative resourcing of employers in determining DHP prices, particularly in the case of Navajoland and the other three dioceses with many indigenous employees which are supported by block grants from TEC: Alaska, North Dakota, and South Dakota. Spreading the cost of affordable coverage for indigenous employees across all DHP participants would result in a relatively small added cost to participants, while providing a life changing (and literally lifesaving) benefit to indigenous employees who labor in the same fields and for the same Lord.

Additional Education Efforts to Relieve Pressures on the Denominational Health Plan

In addition to the previously mentioned need for greater education concerning adoptions of the Medicare Small Employer Exception, we recommend efforts be focused in two other areas that may have the potential to help relieve pressures on DHP:

- Better education of Group Administrator on the importance of selectivity in selecting the plans which will be offered to employees
- Better education across the church on the use and benefits of Consumer Directed Health Plans

At the Episcopal Benefit Administrators Conference for 2023, a majority of diocesan administrators present (55%) indicated that a single staff member is responsible for choosing the plan offerings for each group. Additionally, 49% of administrators present indicated their group offered 5 or more plan options to participants.

As more plans are offered at Open Enrollment to a given group, the greater the likelihood that high-cost participants will be centralized in the most generous plans, while lower-cost participants are distributed across all offered plans – which will inevitably result in rising costs for all plans offered. Exercising discretion in offering as few plans as possible to meet the needs of the group may have a salutary effect in controlling costs.

One prudent practice for each group administrator might be to offer a limited number of plans – perhaps a single PPO, a single CDHP, and their Medicare supplement counterparts – ideally within a single provider network that fits the care profile of the group. While the needs of each group (e.g. a diocese) will differ – and many groups may not be able to conform to a single “best practice” – CPG’s expertise in the DHP’s plan offerings and established client relationships with group administrators provides a meaningful conduit for aiding administrators in offering plan selections that balance employee needs while not overextending and exacerbating adverse selection phenomena.

Similarly, the DHP has lower rates of usage for Consumer Directed Health Plans (CDHPs) than among secular employers. These plans – which pair a high deductible and fixed coinsurance together with an employee-owned Health Savings Account (HSA) into which employees and employers make tax-advantaged contributions to meet health care costs – require significant education for both group administrators and employees alike. “Sticker shock” at a high deductible often keeps administrators and employees from opting for these plans; in many cases, however, the cost of CDHP rates paired with employer HSA funding of a substantial amount of the higher deductible may end up providing lower costs to employees *without* increasing that employee’s overall out-of-pocket cost exposure.

At the same time, Consumer Directed Health Plans (CDHPs) most benefit more informed health care consumers – especially those who are on a peer relationship to their providers. As such, the “on ramp” to CDHP adoption among the entire insured population may be longer than that associated with more traditional PPO plans. Employers must carefully plan in setting the proper rate of HSA funding to

incentivize plan adoption; plan for the proper long-term adjusting of those contributions as HSA balances of employees increase through continued contributions and investment. Employees need to understand fully how their plans work, think about how to manage their health care by readily and consistently availing themselves of free preventative care (annual physicals, for example) built into the plan, while also being sure not to defer necessary care out of fear of “sticker shock.” The fundamental difference between CDHP/HSA plans and PPOs require extensive education, but when well educated, can produce great results for employees and employers without compromising care.

Final Note on Proposed Resolutions

The canonical, legal, and regulatory structure of the Denominational Health Plan is awkwardly shared between The Episcopal Church and the Church Pension Group. The Canons of the church create the DHP mandate for employees over 1,500 hours annually and provide authority to CPG to implement and manage the Denominational Health Plan by setting insurance rates and paying insurance claims. A past resolution of General Convention, 2009-A177, by canon sets the underlying principles and intent for the DHP. Yet it is the responsibility of the Board of the Church Pension Group to ensure the proper operation of DHP, its legal and regulatory compliance, and to manage its finances to sustain DHP as a going concern.

As such, these resolutions urge the Church Pension Group to make specific changes to DHP and the Medical Trust in keeping with this report and are understood by the Task Force as an addition to the underlying principles for the DHP first expressed in 2009-177 – in line with the way resolutions previously adopted by General Convention on DHP after its founding in 2009 (2012-B026, 2018-C023) have been interpreted by the church and CPG.

We very intentionally do not offer explicit actuarial mechanisms, formulas, or specific instructions for their implementation beyond that which is explicitly stated within the resolutions and explanations themselves – such responsibility ultimately will rest with the Board of the Church Pension Group, and CPG’s staff.

Proposed Resolutions

A100 Adopt Cost Controls in Denominational Health Plan

Resolved, That the 81st General Convention urge the Church Pension Group to take actions to make the health insurance plans offered by the Episcopal Church Medical Trust self-sufficient and self-funding at each offered benefit level to the extent possible and appropriate; and be it further

Resolved, That the Church Pension Group be urged to offer health insurance benefit offerings in the Episcopal Church Medical Trust comparable to those offered by the benefit agencies of similar denominations including, but not limited to, the Evangelical Lutheran Church in America, the United Methodist Church, the Presbyterian Church USA, and the United Church of Christ, and to continue collaborating with them when feasible for achieving greater purchasing power in the provision of prescription drug benefit offerings.

EXPLANATION

The rising cost of health insurance presents a continuing challenge to communities within The Episcopal Church seeking to provide quality benefits for health care to their employees at an affordable cost. While the Church Pension Group has moved to control costs to the fullest extent of their ability, the church itself needs to recommend specific changes to keep costs affordable.

At present, not all benefit levels within the Episcopal Church Medical Trust are self-supporting, which leads to rising costs across all plans offered to employees and dependents. Many of our benefit offerings are also out of step with those offered to lay and clergy employees in our peer denominations.

This resolution expresses the desire of the church for CPG to take steps to contain costs within the Denominational Health Plan by taking steps to make each benefit level self-sustaining to the extent possible, and by seeking to keep benefit offerings in line with those offered by our sibling denominations.

A101 Revise DHP Pricing Structures for Equitable Access

Resolved, That the 81st General Convention reaffirms The Episcopal Church's commitment to maintaining parity in health benefits offered to clergy and lay employees of The Episcopal Church and its dioceses, congregations, institutions and communities; and be it further

Resolved, That the 81st General Convention urge the Church Pension Group to adopt methods to provide equitable churchwide pricing of plans offered by the Episcopal Church Medical Trust, including by taking into account additional factors that may increase equity such as (a) the relative ability of each covered community to pay for needed benefits, and (b) the prevailing cost of comparable coverage within the area covered by each group; and be it further

Resolved, That the 81st General Convention urge the Church Pension Group to adopt a pricing structure that will ensure the ability of the Navajoland Area Mission and the Dioceses of Alaska, North Dakota, and South Dakota to provide plans through the Episcopal Church Medical Trust to their qualifying lay and clergy employees and their dependents, most especially to those who presently only receive coverage through the Indian Health Service (IHS) of the United States Department of Health and Human Services (HHS).

EXPLANATION

At present, lay employees make up a majority of those covered by the Denominational Health Plan. As such, the continued requirement of parity in benefit offerings between clergy and lay employees is paramount to the affordability and financial sustainability of the plan.

However, based on a prior resolution of the General Convention, CPG has been asked to strive to price health insurance offerings at a universal price without regard to location. This prior resolve, while well intended, did not consider a critical factor of health care in the United States – that the cost of health care varies dramatically across the country, just as cost of living varies from place to place. This has led to insurance rates that are often out-of-sync with a church community's local insurance market.

This resolution reaffirms the necessity of lay/clergy parity in benefits, while asking CPG to consider two factors when it sets insurance rates for health plans – the ability of a covered community to pay, and the prevailing cost of comparable health care within the area covered by each group.

Finally, we seek to correct an injustice that has created a disparity in health care access between indigenous and white employees of the church – some indigenous lay and clergy employees do not receive Denominational Health Plan coverage, instead relying on coverage provided by the Indian Health Service (IHS) of the United States Department of Health and Human Services that does not meet their present need. Our failure as a church to provide equal offerings must be rectified.

This resolution asks CPG to set a rating structure that would provide extra support to the Navajoland Area Mission, and to those US dioceses who receive block grants from the DFMS budget, to ensure that all employees of the church have access to quality health care.

A102 Churchwide Education Efforts to Control Healthcare Costs

Resolved, That the 81st General Convention urge the Church Pension Group to continue its education efforts around health insurance benefit selection, with more purposeful attention given to the benefits offered to employees, covered communities, and the whole church through greater use of the Medicare Small Employer Exception by employees age 65 or older in eligible communities; the need for group administrators to exercise discretion in the number of benefit levels offered within a group; and the benefits to employees and covered communities through the adoption and use of Consumer Directed Health Plans (CDHPs) and associated Health Savings Accounts, and methods by which institutions may transition their employees to such plan offerings.

EXPLANATION

This resolution asks CPG to undertake purposeful education efforts around the Medical Small Employer Exception (SEE) for employees over age 65, the benefits of targeted selection of plan offerings by benefit administrators in order to combat adverse selection, and to administrators and consumers alike around the use of Consumer Directed Health Plans (CDHPs) and Health Savings Accounts (HSAs) as a cost effective way of providing quality medical care.

Wider uptake of best practices in all three areas could result in significant savings to DHP while not constraining or restricting access to care.

Supplementary Materials

Actuarial Review of the Denominational Health Plan of The Episcopal Church,
prepared by Lewis and Ellis Actuaries and Consultants for the Task Force.



ACTUARIAL REVIEW OF THE
DENOMINATIONAL HEALTH PLAN

THE EPISCOPAL CHURCH

DECEMBER 4, 2023

LEWIS & ELLIS

BONNIE S. ALBRITTON, FSA, MAAA
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December 4, 2023

The Task Force to Advise the Church on the Denominational Health Plan
The Reverend David C. Sibley
Task Force Chair
815 2nd Avenue
New York, NY 10017

Re: The Episcopal Church
Actuarial Review of the Denominational Health Plan

Dear Reverend Sibley:

We are pleased to present our report documenting our review of the Episcopal Church's Denominational Health Plan.

We appreciate the opportunity to be of service. If you have any questions, please call.

Sincerely,

A handwritten signature in blue ink that reads 'Bonnie Albritton'.

Bonnie S. Albritton, FSA, MAAA
Vice President & Principal

A handwritten signature in blue ink that reads 'Ari T. Loiben'.

Ari T. Loiben, ASA, MAAA, MS
Vice President & Principal

Enclosures

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EXECUTIVE SUMMARY

The 80th General Convention of The Episcopal Church (“the Church”) created a task force (“the Task Force”) to advise the Church on the Denominational Health Plan (“DHP”), with emphasis on the cost of benefits. The Task Force was asked to *“review the structure and offerings of the Denominational Health Plan with special attention to the cost of premiums and to report back to the 81st Convention a list of options to reduce health insurance costs across the church, including an examination of the impact of individual faith communities opting out of the Denominational Health Plan, with a full explanation of the reasoning for and costs and benefits of each option.”*

Lewis & Ellis (“L&E”) was asked to provide an independent review of the DHP to assist the Task Force in completing this charge. This report documents our review, findings, and recommendations for the Task Force.

Some of the past and current objectives of the DHP include working to manage overall healthcare costs, achieving parity in cost sharing between clergy and lay employees and reducing premium disparities among dioceses. While working to achieve these objectives, the DHP also tries to balance high-quality benefits with financial stewardship for the Church. Sometimes these objectives can be difficult to achieve because they can be competing and improvement in one area may negatively impact another area.

The Church Pension Group (“CPG”) has implemented several cost-saving strategies over the past several years and continues to do so. However, at a certain point, it becomes difficult to continue squeezing out savings in the areas where members are minimally impacted. The Task Force has the difficult job of considering certain changes that may be challenging to implement because they will have more impact on the members.

We separated our review into several broad categories to address the requests from the Task Force which are outlined in the report. The scope of our analysis only includes the self-funded benefits for active employees. It does not include fully insured plans or benefits for retirees.

Observations and Recommendations

- **Carriers:** Resolution 2018-C023 from the General Convention requested at least two national health insurance carriers in each diocese. The DHP has Anthem and Cigna as the two national health carriers and Kaiser in several regions. Kaiser has a different business model, so we included the fees associated with carriers in our comparisons. Based on our analysis, the Anthem and Cigna benefit options are performing well, and average claims are consistent with each other. There is some subsidization of costs by the Kaiser benefit options.
- **Meaningful Differences:** While the DHP offers 17 benefit options between Anthem, Cigna, and Kaiser, there are 7 benefit options nationwide and 3 Kaiser plans. It is our opinion that the options provide meaningful differences in benefits and there is enough of a difference that we do not recommend eliminating a benefit option for this reason.
- **Anthem/Cigna PPO 100:** This benefit option has no deductible, no coinsurance, limited copayments, and a \$2,000 out-of-pocket maximum. None of the benefit plans offered by the other religious organizations we researched have comparable benefits. Based on the Employer Health Benefits

2023 Annual Survey published by Kaiser Family Foundation, only 10% of employees are covered by a plan with no deductible. In addition, none of the other researched denominations provide benefits that are as rich as this plan. The PPO 100 option has 21% of the membership and a one-year loss ratio¹ of 111%. The cost of this benefit option is being heavily subsidized by other lower-cost benefit options. ***We recommend that the Task Force consider removing this option, adjusting some of the benefits (such as adding coinsurance), or starting to increase the premium rates to remove some of the subsidization by the other plan options. Eliminating the plan could result in savings up to approximately \$6 million or 2.8% of contributions.***

- **Anthem/Cigna PPO 90:** This benefit option is in a similar situation as the Anthem/Cigna PPO 90 has a \$500 deductible, 10% coinsurance, and \$2,500 out-of-pocket maximum. The benefit option has 20% of the membership with a 102% one-year loss ratio. The cost of this benefit option is also being heavily subsidized by other lower-cost benefit options. While there are some religious organizations that provide similar benefit options, based on the overall employer marketplace, the cost-sharing is still very low.

 - ***We recommend that the Task Force consider removing this option, adjusting some of the benefits (such as increasing coinsurance amounts), or starting to increase the premium rates to remove some of the subsidization by the other plan options. Eliminating this plan, in addition to the PPO 100 option could result in savings up to approximately \$18 million of 8.4% of contributions.***
 - ***As an alternative to removing the plan, we recommend changing some of the benefits. We estimate that changing the in-network coinsurance from 10% to 20% and the out-of-pocket maximum from \$2,500 to \$3,000 can reduce the per employee cost of the PPO 90 benefit option by approximately 8%².***

- **Coverage Tiers³:** The DHP allows each diocese to select the number of coverage tiers for their rates. The 3-tier employer groups account for 45% of membership with a one-year loss ratio of 100%. Within the 3-tier groups, the Employee+1 rates are being significantly subsidized by the employee only and family tiers. ***While we do not recommend significant adjustment at one time, the Task Force may want to consider adjusting the 3-tier Employee +1 rates over several years.***

- **Post-65 Employees:** There is significant subsidization by pre-65 members for the post-65 members. The post-65-member benefit cost is almost double the pre-65 members, but average contributions are only 20% higher than pre-65. Even among the Medicare-primary members, the costs are 69% higher but contributions are only 5% higher than pre-65. While higher costs are expected for older members, the impact is exacerbated because the older employees are electing the richer benefit options at a higher rate. Over 70% of Medicare-primary employees and 56% of DHP-primary employees have selected one of the two highest-cost plans. In contrast, only 40% of pre-65 employees have selected these plans. ***This analysis reinforces our recommendation that the Task Force consider making changes to the PPO 100 and PPO 90 plans.***

¹ The loss ratio is claims divided by premiums and does not include administrative expenses.

² Based on modeling the plan changes in the L&E Group Medical Manual.

³ 2-Tier: Employee/Family; 3-Tier: Employee/Employee+1/Family; 4-Tier: Employee/Employee+Spouse/Employee+Childr(ren)/Family

- **Mandatory Coverage Opt-Out:** We caution the Task Force against allowing employer groups to opt out of the DHP. Currently, 80% of the membership originates from Mandatory groups, and removing the mandate could drive a significant portion of the healthier groups away towards lower-cost solutions. This could cause the future experience to deteriorate exponentially. ***We recommend making some of the other adjustments discussed above in order to bring down the cost for the mandatory groups.***

SCOPE OF SERVICES

The Church Pension Group and the Domestic and Foreign Missionary Society of the Episcopal Church have engaged Lewis & Ellis, Inc., to perform an actuarial analysis of the Denominational Health Plan.

The 80th General Convention of The Episcopal Church created a task force to advise the Church on the DHP, with emphasis on the cost of benefits. The Task Force was asked to *“Review the structure and offerings of the Denominational Health Plan with special attention to the cost of premiums and to report back to the 81st Convention a list of options to reduce health insurance costs across the church, including an examination of the impact of individual faith communities opting out of the Denominational Health Plan, with a full explanation of the reasoning for and costs and benefits of each option.”*

More specifically, we were asked to:

- Review the current state of the DHP and make recommendations for improvements, most notably, that will reduce overall costs, while providing meaningful levels of benefits and cost sharing for clergy and lay employees participating in the DHP.
- Evaluate the distribution of risk and cross-diocese subsidy.
- Assess the impact of groups beyond those under a mandate for coverage through the DHP.
- Evaluate appropriate levels of reserves and surplus held by the DHP.

BACKGROUND

The Episcopal Church Medical Trust (“Medical Trust”) is an employee healthcare benefits organization and an affiliate of The Church Pension Fund (“CPF”). The Medical Trust sponsors health plans that have served The Episcopal Church since 1978.

The Medical Trust administers the Denominational Health Plan, established in 2009 by the 76th General Convention’s passage of Resolution A177 and reaffirmed in 2012 by Resolution B026 passed by the 77th General Convention. The resolutions requested that the Medical Trust administer a national healthcare plan and provide an annual status report.

These resolutions:

- Established the DHP for all domestic dioceses, parishes, missions, and other ecclesiastical organizations or bodies subject to the authority of the Church,
- Covered clergy and lay employees who are scheduled to work a minimum of 1,500 hours annually,
- Required dioceses to ensure parity in cost sharing between clergy and lay employees, and
- Requested that the Medical Trust continue to reduce the disparity of health care premiums among dioceses.

In addition, Resolution 2018-C023 requested that the Medical Trust strive to make available at least two national health insurance carriers in each diocese.

The DHP has two categories of employer groups.

- **Mandatory:** Institutions under the authority of the Episcopal Church are required to provide and subsidize coverage for clergy and lay employees working at least 1,500 hours per year. Employees working between 1,000 and 1,500 hours are eligible for benefits, but employer subsidization is not required.
- **Voluntary:** Employees of institutions affiliated with the Episcopal Church which are normally scheduled to work at least 1,000 compensated hours per year are eligible.

The mandatory groups make up 103 of the employers participating in the Medical Trust and approximately 78% of the enrolled employees and 80% of the members.

DATA RELIANCE

CPG staff provided the data upon which we relied, including the enrollment, contribution rates, claims data and other information. We have reviewed the data for reasonableness but have not audited it. To the extent that there are material inaccuracies in the data, our results may be accordingly affected.

LIMITATIONS

The analysis included in this report involves the Episcopal Church's Denominational Health Plan. Our services were provided on behalf of the Church Pension Group and the Domestic and Foreign Missionary Society of the Episcopal Church. The information included in this report is for the use of the General Convention's Task Force in their review of the benefits, pricing, and recommendations to report back to the General Convention. These communications should not be relied upon for any other purpose.

The date through which data or other information has been considered in developing the findings included in this report is July 31, 2023. We are not aware of any subsequent events that may have a material effect on the actuarial findings.

We understand that this report will be provided to the General Convention which may result in it becoming publicly available. However, the report may only be distributed to other parties in its entirety. In addition, any third party with access to this report acknowledges, as a condition of receipt, that L&E does not make any representations or warranty as to the accuracy or completeness of the material. Any third party with access to these materials cannot bring suit, claim, or action against L&E, under any theory of law, related in any way to this material.

CPG and the Domestic and Foreign Missionary Society of the Episcopal Church agreed to pay Lewis & Ellis, Inc., a fee for preparing this report. Other than regarding that contract, we are financially and organizationally independent from the Episcopal Church and any entity or individual related to the Church. There is nothing in our relationship with the Church that would impair or seem to impair the objectivity of our work.

There are no assumptions or method prescribed by law with respect to the scope of this report. The actuary does not disclaim responsibility for any material assumption(s) or method(s).

SECTION I

PLAN BENEFIT DESIGN

OVERVIEW OF CURRENT PLANS

The scope of our analysis only includes the self-funded benefits for active employees. It does not include fully insured plans or plans for retirees.

Summary of Benefits

The DHP currently offers four PPO and three high deductible plans through Anthem and Cigna. There are three regional Kaiser plans. The following table provides a brief summary of the medical benefits by plan. More details are included in Appendix A for reference.

Plan	In-Network Deductible ⁴	Out-of-Pocket Maximum ⁵	Coinsurance	PCP / Specialty Visit
Anthem/Cigna PPO 100	\$0 / \$0	\$2,000 / \$4,000	0%	\$30 / \$45
Anthem/Cigna PPO 90	\$500 / \$1,000	\$2,500 / \$5,000	10%	\$30 / \$45
Anthem/Cigna PPO 80	\$1,000 / \$2,000	\$3,500 / \$7,000	20%	\$30 / \$45
Anthem/Cigna PPO 70	\$3,500 / \$7,000	\$5,000 / \$10,000	30%	\$30 / \$45
Anthem/Cigna CDHP-15/HSA	\$1,600 / \$3,200	\$2,400 / \$4,800	15%	15%
Anthem/Cigna CDHP-20/HSA	\$3,000 / \$5,450	\$4,200 / \$8,450	20%	20%
Anthem/Cigna CDHP-40/HSA	\$3,500 / \$7,000	\$6,000 / \$12,000	40%	40%
Kaiser EPO High	\$0 / \$0	\$1,750 / \$3,500	0%	\$25
Kaiser EPO 80	\$500 / \$1,000	\$3,400 / \$7,000	20%	\$25
Kaiser CDP-20/HSA	\$3,000 / \$5,450	\$4,200 / \$8,450	20%	20%

The prescription drug benefits are summarized below. For each of the Anthem/Cigna PPO plans, there is a choice between Standard and Premium drug coverage.

Prescription Drugs	Generic	Preferred Brand	Non-Preferred Brand	Specialty
Anthem/Cigna Standard PPO	\$10 Copay	25% up to \$40	40% up to \$80	40% up to \$100
Anthem/Cigna Premium PPO	\$5 Copay	\$35 Copay	\$70 Copay	\$90 Copay
Anthem/Cigna CDHP	Coinsurance	Coinsurance	Coinsurance	Coinsurance
Kaiser EPO	\$5 Copay	\$30 Copay	\$70 Copay	\$90 Copay
Kaiser CDHP	Coinsurance	Coinsurance	Coinsurance	Coinsurance

⁴ Individual/Family

⁵ Individual/Family

Benefit Selection

The DHP was initially structured and continues to allow each diocese to determine which plans will be offered to parishes within the diocese. A few dioceses have allowed their larger parishes to select their own benefit options. Administratively, they are set up as separate “groups” within the plan.

Employee Contributions

Each diocese determines the employee contributions for each plan option. The DHP does not have a minimum level; the only requirement is parity between clergy and lay employees. Most dioceses allow individual parishes the latitude to set their own level to meet their financial needs.

CPG does not have the authority to make any requirements about the employee contribution strategy and/or level. However, there are discussions between CPG and the diocesan and large parish administrators to help inform their employer-subsidy decision making.

CPG does not have access to the actual employee contributions, but their research indicates that there is an even mix across dioceses using percentage-based employee contribution strategies and diocese using a core plus buy-up/buy-down employee contribution strategy⁶.

CURRENT MARKETPLACE OFFERING

For a comparison to the current marketplace, we considered two primary sources: the Employer Health Benefits 2023 Annual Survey published by Kaiser Family Foundation (“KFF Survey”)⁷ and publicly available information for health plan options offered by other religious organizations. The KFF Survey provides a current snapshot of employer-sponsored health benefits based on its annual survey of private and non-federal public employers with three or more workers.

The following sections provide summaries based on our research. In addition, we have provided comparisons to current DHP offerings when applicable.

Plan Type

The KFF Survey provides a high-level summary of the distribution of plan types offered by employers as well as the distribution of employers that offer varying types of plans. See the summary tables below.

Plan Type ⁸	Distribution
HMO	13%
PPO	47%
POS	10%
HDHP	29%
Indemnity	1%

⁶ Core plus buy-up/buy down: The diocese selects a core plan for which the employer subsidy amount is set. The employee has the option to buy-up to a higher-cost plan or buy-down to a lower-cost plan at the employee’s own cost.

⁷ <https://files.kff.org/attachment/Employer-Health-Benefits-Survey-2023-Annual-Survey.pdf>.

⁸ HMO: Health Maintenance Organization; PPO: Preferred Provider Organization; POS: Point-of-Service plan; HDHP: High Deductible Health Plan; Indemnity: No provider networks and same cost sharing for all services.

As is the case with the DHP, the majority of those considered in the study are enrolled in either a PPO or HDHP plan.

Number of Plan Types	Distribution
1	77%
2	18%
3+	5%

While more than three-quarters of the total employers only offer a single plan type, over half of the large employers (200 or more workers) offer more than one plan type. The DHP is competitive from this standpoint, typically offering at least two plan types to each group.

Employee Cost Sharing (Medical)

DEDUCTIBLES

Based on the KFF Survey, 10% of employees are enrolled in a plan with no deductible. The DHP plans have 24% of employees with no deductible.

For employees with a deductible, the average deductible for employee only coverage⁹ is \$1,281 and \$2,611 for PPO and HDHP plans, respectively. The average DHP deductible for employees with a deductible is \$951 for PPO and \$2,763 for HDHP plans.

The DHP’s offerings are in line with these industry results; however, the up-take in low deductible plans is greater for the DHP vs. the industry. Additionally, the distribution by plan type and deductible amount is provided in the following table.

Deductibles	HMO	PPO	POS	HDHP	All Plans	DHP Plans
\$0 ¹⁰	N/A	N/A	N/A	0%	10%	24%
\$1 - \$499	16%	15%	11%	0%	7%	0%
\$500 - \$999	30%	32%	15%	0%	18%	26%
\$1,000 - \$1,999	35%	33%	41%	36%	37%	26%
\$2,000 - \$2,999	12%	9%	14%	32%	14%	0%
\$3,000 or More	7%	10%	19%	33%	14%	24%

OUT-OF-POCKET MAXIMUM

The out-of-pocket maximum is the amount that an enrollee must pay before all additional costs are covered by the health plan. The average employee-only out-of-pocket maximum is \$4,346, and the distribution by plan type is provided in the following table. For the DHP plan, the average out-of-pocket maximum is \$3,072.

⁹ In this section of the report, our focus is on the employee deductible/out-of-pocket maximum, but family deductibles/out-of-pocket maximums are typically 2- to 3-times the employee amount.

¹⁰ The KFF Study only disclosed the percentage of all plans with zero deductible and did not distinguish between plan types.

Out-of-Pocket Max	HMO	PPO	POS	HDHP	All Plans	DHP Plans
\$2,000 or Less	28%	15%	15%	1%	13%	24%
\$2,001 - \$3,000	20%	22%	14%	13%	19%	25%
\$3,001 - \$4,000	11%	24%	14%	34%	24%	25%
\$4,001 - \$5,000	18%	10%	13%	22%	14%	24%
\$5,001 - \$6,000	6%	8%	7%	11%	8%	1%
\$6,000 or More	18%	22%	38%	19%	21%	0%

The DHP offerings do not exceed \$6,000, but they provide covered groups with competitive options that allow enrollees to balance benefit richness vs. cost. In addition, as evidenced in the table above, employees are taking advantage of these offerings by enrolling in richer plans compared to the industry.

PHYSICIAN OFFICE VISITS

Regarding primary care and specialist visits, the KFF Survey discloses the average copay and coinsurance amounts for each service are as follows. Approximately 70% of these visits have a copay structure while 20% require a coinsurance payment. The DHP copay/coinsurance amounts for these services are very consistent with these averages.

Visit Type	Copay	Coinsurance	DHP Copay	DHP Coinsurance
Primary Care	\$26	19%	\$30	20%
Specialist	\$44	20%	\$45	20%

Employee Cost Sharing (Prescription Drugs)

More than 80% of prescription drug plans offered by employers have three or more tiers per the KFF Survey. Regarding these plans, the following table provides the average cost sharing to enrollees depending on whether the plan applies copays or a coinsurance structure. The first four tiers exclude specialty drugs completely.

Rx Tier	Copay	Coinsurance	DHP Copay ¹¹	DHP Coinsurance
First Tier (Generics)	\$11	20%	\$9	20%
Second Tier (Preferred)	\$36	26%	\$38	20%
Third Tier (Non-Preferred)	\$66	38%	\$77	20%
Fourth Tier (Other)	\$125	28%	N/A	20%
Specialty	\$110	26%	\$97	20%

The distribution of employees by the cost-sharing structure and tier from the KFF Survey is as follows. In this case, "Other" represents some other cost sharing form or no cost sharing at all.

¹¹ The DHP's Standard Plan cost sharing for tiers other than generic is a percentage of the cost, up to a dollar amount. We assumed that cost sharing will be at the maximum for comparison purposes.

Rx Tier	Copay	Coinsurance	Other	DHP Copay	DHP Coinsurance
First Tier (Generics)	82%	13%	5%	73%	27%
Second Tier (Preferred)	73%	23%	4%	73%	27%
Third Tier (Non-Preferred)	69%	27%	4%	73%	27%
Fourth Tier (Other)	56%	41%	3%	73%	27%
Specialty	42%	50%	8%	73%	27%

The various DHP offerings for prescription drug coverage are competitive with the results of the KFF Survey.

Health Promotion & Wellness Programs

Health promotion and wellness programs are designed to be utilized by enrollees to better their overall health and manage/prevent disease. While there is initial investment, with enough participation and successful implementation, these types of programs can benefit not only the enrollees but provide cost savings to the plan by limiting and preventing further healthcare needs. It is our understanding that the DHP does not currently implement these programs apart from what may be included in case management, maternity, and autism solutions through the different carriers.

The KFF Survey summarizes the percentage of employers participating in various health promotion and wellness programs. The following table provides this detail bifurcated by size of employer (i.e., large firm employees 200 or more workers).

Description	Small Firms	Large Firms	All Firms
Health Risk Assessment	36%	54%	36%
Biometric Screenings	15%	42%	16%
Health & Wellness Promotion Programs ¹²	62%	80%	63%
Disease Management Programs	36%	64%	37%

In addition, 59% of large firms that employ Health Risk Assessments use incentives/penalties to ensure assessment completion whereas 67% of such large firms take a similar approach when implementing Biometric Screenings. Of those performing biometric screenings, 20% also institute incentives/penalties based on whether enrollees meet specified biometric outcomes (e.g., maintaining cholesterol levels, body weight, etc.).

HSA Employer Contributions

Based on the KFF Survey, approximately 40% of employers do not contribute to their employees’ HSA accounts. However, for those contributing employers, the average annual contribution for employee-only and family coverage is \$791 and \$1,471, respectively.

There is not a requirement for employers to contribute to their employees’ qualified HSA accounts and CPG does not have any information regarding any employer contributions.

¹² These programs include smoking cessation, weight management and behavioral or lifestyle coaching.

Premiums and Employee Contributions

PREMIUMS

The following tables compare the average annual premiums by region for single vs. family¹³ coverage from the KFF Survey and the DHP offerings for employees in-force as of July 2023. The premiums are shown on a per employee basis.

Region ¹⁴	KFF Survey		DHP Plans	
	Single	Family	Single	Family
Northeast	\$9,167	\$26,146	\$11,630	\$28,575
Midwest	\$8,353	\$23,861	\$11,709	\$26,660
South	\$8,050	\$23,330	\$11,007	\$25,224
West	\$8,474	\$22,896	\$11,314	\$25,375
All Regions	\$8,435	\$23,968	\$11,328	\$26,886

As seen above, the Northeast is among the highest premium regions for both the KFF Survey and the DHP plans. However, the relationships among the regions are not as consistent when comparing the KFF Survey and the DHP average contributions. This is partially due to inconsistencies in how states are assigned to the KFF Survey regions vs. the Provinces of the DHP.

Overall, this summary indicates that DHP contribution rates are significantly higher than average employer-based coverage (i.e., 34% greater for employee-only coverage). A reasonable explanation for this is likely the concentration of the DHP membership in very rich benefit plans (e.g., approximately 70% of the DHP membership is enrolled in plans with a deductible of \$1,000 or less with more than 24% enrolled in a \$0 deductible plan) compared with the KFF Survey. In addition, the average age of the DHP employees is higher than the nationwide average.

EMPLOYEE CONTRIBUTIONS

In terms of employee contributions, the KFF Survey reports that employees contribute 17% and 29%, on average, towards single and family coverage premiums, respectively. The following table shows the average employee and employer contributions by plan type.

Plan Type	Employee		Employer	
	Single	Family	Single	Family
HMO	\$1,420	\$7,158	\$6,783	\$16,600
PPO	\$1,507	\$7,108	\$7,399	\$18,120
POS	\$1,456	\$6,938	\$6,940	\$15,917
HDHP	\$1,193	\$5,302	\$6,561	\$17,041
All Plans	\$1,401	\$7,034	\$7,034	\$17,393

CPG does not have enough data to provide a comparison to the DHP contributions.

¹³ In this case, family coverage refers to all tiers excluding employee-only (e.g., EE+SP, EE+CH(N), EE+FAM).

¹⁴ Province assignments by region are as follows: Northeast – Province I, II, III; Midwest – Province V; South – Province IV, VII; West – Province VI, VIII. There are a small portion of DHP policies that were excluded here due to not having an associated Province (Episcopal Services Corps and the Episcopal Camp and Conference Centers groups).

Religious Organizations - Benefit Plan Comparison

We have performed expansive research in order to provide a summary of benefit plan offerings currently being made by other religious organizations to their employer groups. We accumulated data on ten organizations, including:

- Baptist Health
- Concordia Plan
- Evangelical Covenant Church
- Evangelical Lutheran Church of America (Portico)
- Evangelical Presbyterian Church
- GuideStone
- Pension Boards of United Church of Christ
- Reta Smaller Trustor (Catholic)
- The Reformed Church in America
- United Methodist Church (Wespath)

From this information, we summarized deductibles, out-of-pocket maximums, primary care/specialty office visits, prescription drug cost sharing by tier, administrator/carrier, plan types (e.g., PPO, HDHP, etc.) offered and number of plans offered. The summary table is included in Appendix B.

We also included benefit option specific information for the highest-cost and lowest-cost plans for five of the organizations compared to the highest/lowest Anthem/Cigna DHP plan in Appendix C.

As can be seen in the appendices, with the exception of the PPO 100 plan, the DHP plan offerings are within the ranges for these key plan characteristics for the various organizations as was similarly discussed when comparing to the KFF Survey. Eight out of the ten organizations offer more than one plan type (e.g., POS, PPO, HDHP, EPO). Moreover, while eight out of the ten organizations offer between three and six plans, Concordia Plans offers 15 plans and GuideStone offers 41 plans. The increase in these plan offerings is partially driven by geography and very minor differences within multiple plan options as well as the size of the plans.

We note that there are only two organizations that offer a plan with no deductible. They both have at least 10% coinsurance and larger out-of-pocket maximums than the DHP's no deductible plan (PPO 100).

SECTION II

BENEFIT PRICING AND PRICING STRUCTURE

PRICING OVERVIEW

One of the primary concepts with insurance is sharing risk. Everyone pays into the plan with the goal of being able to pay medical expenses – at some points, certain members have higher claims than others, so the expense balances out. An individual may have a year where they pay more in premiums than they receive in benefits, but in other years, that person may have medical costs that exceed the premiums they pay. As an example, there is generally, but not always, subsidization of the costs by younger employees for the benefit of older employees.

As health insurance has evolved, different risk classifications have been considered so that there is more equity, and the healthier groups of employees are paying an amount that is closer to their risk.

When employers offer multiple benefit options and employees have the choice of which option to select, they will generally select the plan that is most advantageous. If an individual typically has high medical costs, they will usually select the plan with the most generous benefits. However, there are ways to attempt to steer employees based on, for example, the contribution amount required by the employee.

One other important consideration in plan design – when a member does not have to pay for medical services, their utilization will be higher. While some medical costs are unexpected and out of the control of the members, there are others that are elective and discretionary. Utilization tends to increase with benefit options that have very little cost sharing or once the member reaches the out-of-pocket maximum.

In the group health insurance industry, common rating characteristics include age, gender, health status (e.g., risk adjustment), rating tiers, geographic factors, industry factors, and group size.

Other pricing factors may include:

- participation levels, meaning the percentage of eligible employees who elect coverage, and
- the level of the employee’s contribution to the premiums.

Within a group, there can be subsidization that is intentional or unintentional. For example, the General Convention’s request to reduce disparities in health care contributions among dioceses is intended subsidization. Unintentional subsidization could be the higher-cost individuals selecting benefit options with richer benefits, causing the contributions for all benefit options to increase.

DHP RATE-SETTING PROCESS

There is a two-step process in developing rates for the year. As a Voluntary Employees’ Beneficiary Association (“VEBA”), all contributions collected from participating groups go directly to paying claims, to cover annual expenses and vendor fees, and to maintain adequate reserves and capital position to meet the financial commitments.

CPG’s first step is to determine the total annual contributions required to pay projected claims and expenses for the plan year. The most recent 24 months of claims experience are pooled for the combined DHP and voluntary groups, adjusting for known and expected changes, adjusting for large claims and stop-loss reinsurance, and reviewing the current and forecasted capital position. Additionally, experience is analyzed and monitored separately for the DHP and voluntary populations to maintain each pool as self-supporting.

The second step of the rate-setting process is to distribute the total annual required contributions across the participating groups. Generally, the overall percentage increase is applied to all participating groups with certain adjustments made to maintain the DHP objective of reducing cost disparities, considering the demographic profile of each group, local healthcare costs, and group experience to the degree it is credible.

OVERVIEW OF ANALYSIS

We reviewed the DHP's benefits, looking at several different segments of employees and from several different perspectives. Within each segment, we compared the claims and carrier fees to the contributions, which is the loss ratio. This measures the extent to which the contributions are adequate to cover the claims and ASO-specific fees independent of the other categories. There are other administrative costs associated with the DHP, which increase the loss ratios by approximately 4%-5%.

Second, we analyzed the relative value of the average contributions to the relative value of the claims for each component of the segment to highlight areas where subsidization is occurring between each segment component.

We reviewed the following segments.

- Carrier – Anthem, Cigna, Kaiser
- Benefit Option
- Coverage Tier
- Region
- Mandatory and Voluntary
- Clergy and Lay
- Pre-65 and Post-65 Employees

We used claims incurred from May 1, 2022 to April 30, 2023, with claim runout through July 31, 2023. We defined this timeframe as our Experience Period. Since we used three months of runout, we did not make any adjustments for claims incurred but unpaid as of April 30, 2023. In addition, current membership counts are based on in-force data as of July 2023.

To provide a complete picture of the costs, we added the administrative fees associated with each carrier and plan type (e.g., PPO, EPO, CDHP) from the Profit & Loss statement ("P&L") provided by CPG. The fees included stop-loss premiums, vendor administrative fees, health advocate, EAP, and vision. The fees were offset by stop-loss recoveries and pharmacy rebates received. In our report, we refer to these expenses and offsets collectively as "ASO Fees." In some situations, the pharmacy rebates exceed the other administrative fees. We note that the fees do not include General & Administrative ("G&A") expenses as reported in the P&L.

Under normal circumstances, we would apply trend factors to the claims to bring them to the current date. However, since the review was primarily limited to claims and contributions over the same period of time, we did not feel it necessary.

Impact of Benefit Levels on Health Status

With benefit changes, there may be concerns about the impact on health status. There is more available research on the impact of increased cost-sharing on health care utilization than there is on health outcomes. However, there are several factors related to cost-sharing that influence both utilization and health outcomes, including income level and existence of chronic disease in the population.

It is well-established from research that lower cost-sharing increases utilization, especially with middle- to high-income individuals. In addition, there is an increase in utilization of more high-cost but low-value procedures.

In general, individuals with lower income and more chronic disease are more significantly impacted by increased cost-sharing.

One area that has received significant attention, especially with the passage of the Affordable Care Act (“ACA”), is value-based insurance design (“VBID”) which is discussed further in Section III. Limited or no cost-sharing for preventive care is an example, which is designed to promote more efficient spending by catching problems early.

As the Task Force considers changes, it will be important to consider the impact on health outcomes through thoughtful benefit changes.

REVIEW OF CARRIERS

Overview

The DHP provides health benefits through three main carriers – Anthem BlueCross Blue Shield, Cigna Healthcare, and Kaiser Permanente.

Anthem and Cigna provide nationwide coverage. The DHP provides the same benefit options through both carriers. Anthem has better network coverage and/or network discounts in some areas and Cigna is better in other areas. However, the DHP offers both carriers.

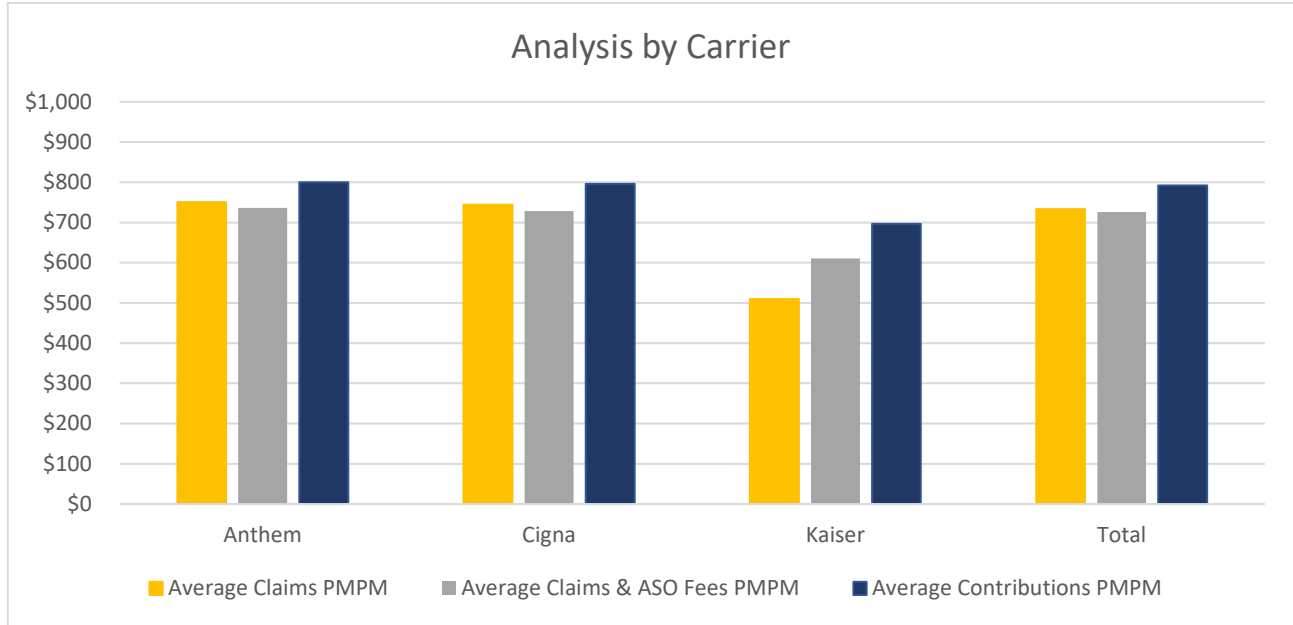
Kaiser has a different business model with tighter controls and a more limited network. Kaiser’s plans are only available in California, Colorado, the District of Columbia, Georgia, Maryland, Oregon, Virginia, and Washington.

Analysis of Carriers

The following table includes the current employee count and percentage in each plan. It also includes the loss ratios over the experience period. We have included the loss ratios two ways – (1) only including the claims and (2) claims and ASO fees – because Kaiser has significantly higher administrative costs.

	Anthem	Cigna	Kaiser	Total
Current Employee Count	9,826	1,610	985	12,421
Employee Distribution	79%	13%	8%	100%
Claim Loss Ratio	96%	96%	74%	95%
Claim & ASO Fee Loss Ratio	94%	94%	89%	94%

The chart below shows the average claims, the average claims and ASO fees, with a comparison to the average contributions on a per member per month basis. Because of the pharmacy rebates, the Anthem and Cigna costs are lower with the ASO fees included.



Using Anthem as the base, we compared the relative value of the average contribution rates and the relative value of the claims. We could have used any of the three carriers as the base, but we chose Anthem since it has most of the DHP enrollment.

The average Cigna contributions are 99% of Anthem and the benefits are 99% of Anthem, which is consistent and indicates no subsidization. However, Kaiser’s average contributions are 87% of Anthem’s but claims and ASO fees are 83%. This indicates that the Anthem and Cigna benefits are subsidized by Kaiser.

With no change in the overall contribution levels, Anthem rates would need to increase 0.4%, Cigna’s rates would need to decrease 0.1%, and Kaiser’s rates would need to decrease by 4.3% to remove the subsidies occurring within the rates.

	Anthem	Cigna	Kaiser
Contribution Relative Value	1.00	0.99	0.87
Claim & ASO Fees Relative Value	1.00	0.99	0.83
Rate Change to Remove Subsidy	0.4%	-0.1%	-4.3%

For each of the segments reviewed, we are not recommending significant rate changes, but they illustrate the extent of subsidization that is occurring.

REVIEW OF CURRENT BENEFIT OPTIONS

Overview

There are four PPO plans and three high-deductible (“CDHP”) plans offered by Anthem and Cigna. For the regions where Kaiser is offered, there are two Exclusive Provider Organization (“EPO”) plans and one CDHP plan.

Analysis of Benefit Options

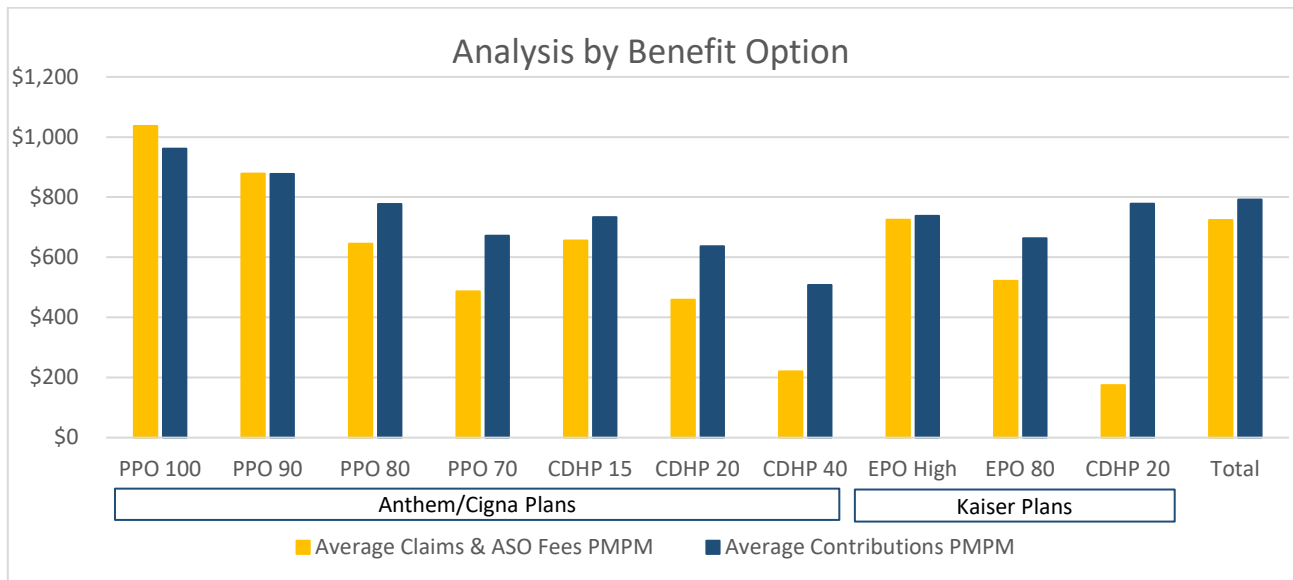
The current member counts, percentage of the members, and loss ratios for each plan option are included in the following table.

	Anthem/Cigna PPO				Anthem/Cigna CDHP			Kaiser Plans		
	PPO 100	PPO 90	PPO 80	PPO 70	CDHP 15	CDHP 20	CDHP 40	EPO High	EPO 80	CDHP 20
Current Employee Count	2,577	2,662	2,670	512	575	2,262	178	461	515	9
Employee Distribution	21%	21%	21%	4%	5%	18%	1%	4%	4%	0%
Claim & ASO Fee Loss Ratio	111%	102%	86%	74%	92%	74%	44%	99%	80%	23%

The loss ratios are highest in the richest plans – the PPO 100 and PPO 90. There are some plans with low enrollment, so the loss ratios and analysis are not as reliable. For example, while the loss ratio for the Kaiser CDHP 20 plan is only 23%, there are only 9 employees in the plan.

The PPO 100 and PPO 90 plans account for 42% of the current employee enrollment. The loss ratios for both plans exceed 100%, meaning the premiums are not adequate for the benefits provided even before accounting for G&A expenses.

The following chart shows the average claims and contributions per member per month for each plan and highlights the richness of the PPO 100 and PPO 90 plans.



For each benefit option, the table below shows the relative value of the benefits and contributions by plan. In addition, we have included our estimate of the expected relative value of the claims, based on the DHP’s relative values, adjusted for L&E’s estimates of demographic differences between the plans.

Finally, we calculated the rate adjustments that would be necessary to bring the premiums in line with the claims assuming no change to the overall aggregate premium income.

	Anthem/Cigna PPO				Anthem/Cigna CDHP			Kaiser Plans		
	PPO 100	PPO 90	PPO 80	PPO 70	CDHP 40	CDHP 20	CDHP 15	EPO High	EPO 80	CDHP 20
Contribution Relative Value	1.00	0.91	0.81	0.70	0.76	0.66	0.53	0.77	0.69	0.81
Claim & ASO Fee Relative Value	1.00	0.85	0.62	0.47	0.63	0.44	0.21	0.70	0.50	0.17
Expected Claim Relative Value ¹⁵	1.00	0.92	0.75	0.60	0.59	0.61	0.50	1.07	0.83	0.71
Rate Change to Remove Subsidy	18.2%	9.6%	-9.1%	-20.7%	-2.0%	-21.0%	-52.5%	7.7%	-13.9%	-75.5%

Using the Anthem/Cigna CHDP 20 plan as an example, the current average contributions are 66% of the Anthem PPO 100. We would expect claims to be 61% of the PPO 100 plan, but over the experience period, they were only 44% of the PPO plan.

Cost-Impact of Removing the PPO 100 Plan

We estimated the cost impact of removing the PPO 100 Plan. We assumed that all current members would migrate from the PPO 100 Plan to the PPO 90 Plan. In order to measure the impact, we adjusted the claims for the current PPO 100 Plan members to be equivalent to the PPO 90 Plan claims on a per capita basis while adjusting for age/gender/area differences. In addition, we revised the contributions based on the nationwide relative values provided by Aon. We estimate savings of approximately \$6 million, or a 4% reduction to the Claim & ASO Fee Loss Ratio.

Cost-Impact of Removing the PPO 100 and PPO 90 Plans

Using the same methodology described above, but assuming all current members in the PPO 100 and PPO 10 Plans will move to the PPO 80 plan. We estimate that savings could be as high as \$18 million or a 9.5% reduction in the loss ratio.

REVIEW OF COVERAGE TIERS

Overview

Each employer groups can choose to offer 2-tier, 3-tier, or 4-tier contribution rates.

- Two Tier: Employee Only, Family
- Three Tier: Employee Only, Employee+1, Family
- Four Tier: Employee Only, Employee & Spouse, Employee & Child(ren), Family

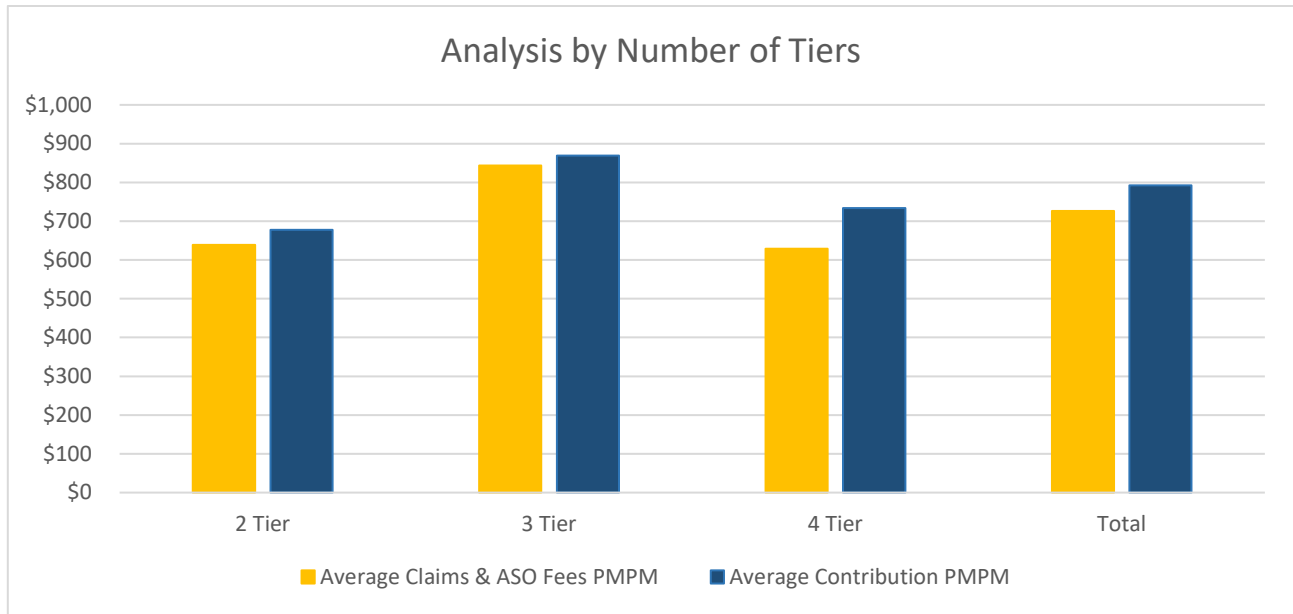
¹⁵ Based on DHP’s 2023 Relative Values with utilization adjustments. Relative values are adjusted to account for area and demographics of the members in each plan option using L&E’s area factors and age/gender factors.

Analysis by Number of Tiers

Most employers have chosen 3- or 4-tier rates. We note that the loss ratios are highest for the 3-tier employers.

	2 Tier	3 Tier	4 Tier	Total
Current Employee Count	456	5,523	6,442	12,421
Employee Distribution	4%	44%	52%	100%
Claim & ASO Fee Loss Ratio	96%	100%	88%	94%

The average claims per member per month are highest for 3-tier groups.



As the table below shows, there is some subsidization in the contribution rates by the 4-tier rate groups.

	2 Tier	3 Tier	4 Tier
Contribution Relative Value	1.00	1.28	1.08
Claim & ASO Fees Relative Value	1.00	1.32	0.98
Rate Change to Remove Subsidy	2.9%	5.9%	-6.5%

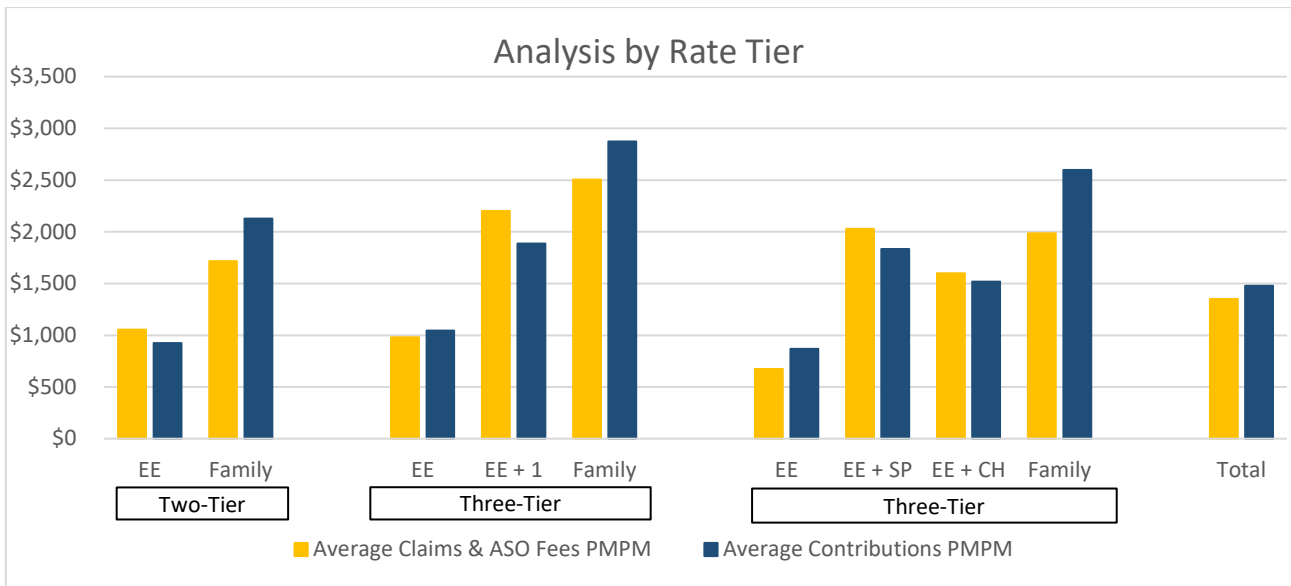
Analysis by Coverage Tier

We also reviewed the individual tiers within the 2-tier, 3-tier, and 4-tier groupings. For this analysis we used a per employee per month basis, as opposed to a per member per month basis. For the two-tier groups, the employee-only loss ratio is the highest. For the three-tier and four-tier groups, the EE + 1 and the EE + SP/EE + CH rate tiers have the highest loss ratios.

Two-Tier Groups		
	EE	Family
Current Subscriber Count	257	199
Subscriber Distribution	2%	2%
Claim & ASO Fee Loss Ratio	117%	83%

Three-Tier Groups			
	EE	EE + 1	Family
Current Subscriber Count	3,073	1,172	1,278
Subscriber Distribution	25%	9%	10%
Claim & ASO Fee Loss Ratio	97%	120%	90%

Four-Tier Groups				
	EE	EE + SP	EE + CH	Family
Current Subscriber Count	3,962	704	667	1,109
Subscriber Distribution	32%	6%	5%	9%
Claim & ASO Fee Loss Ratio	80%	113%	108%	78%



For each tier, we reviewed the subsidization *within* the tier grouping since the prior section looked at the subsidization *between* the tier groupings.

Two-Tier Groups		
	EE	Family
Contribution Relative Value	1.00	2.30
Claim & ASO Fees Relative Value	1.00	1.63
Rate Change to Remove Subsidy	23.0%	-12.9%

Three-Tier Groups			
	EE	EE + 1	Family
Contribution Relative Value	1.00	1.81	2.75
Claim Relative Value	1.00	2.25	2.56
Rate Change to Remove Subsidy	-3.0%	20.8%	-9.9%

Four-Tier Groups				
	EE	EE + SP	EE + CH	Family
Contribution Relative Value	1.00	2.11	1.75	2.99
Claim Relative Value	1.00	3.01	2.37	2.95
Rate Change to Remove Subsidy	-9.1%	29.4%	23.2%	-10.5%

REVIEW OF REGIONS

Overview

Medical costs can vary significantly by region. We summarized the employer groups by the following general regions, even though the costs can vary within each broad region.

- Northeast – Provinces I, II and III
- Midwest – Province V
- South – Provinces IV and VII
- West – Provinces VI and VIII
- Other – Episcopal Services Corps and the Episcopal Camp and Conference Centers

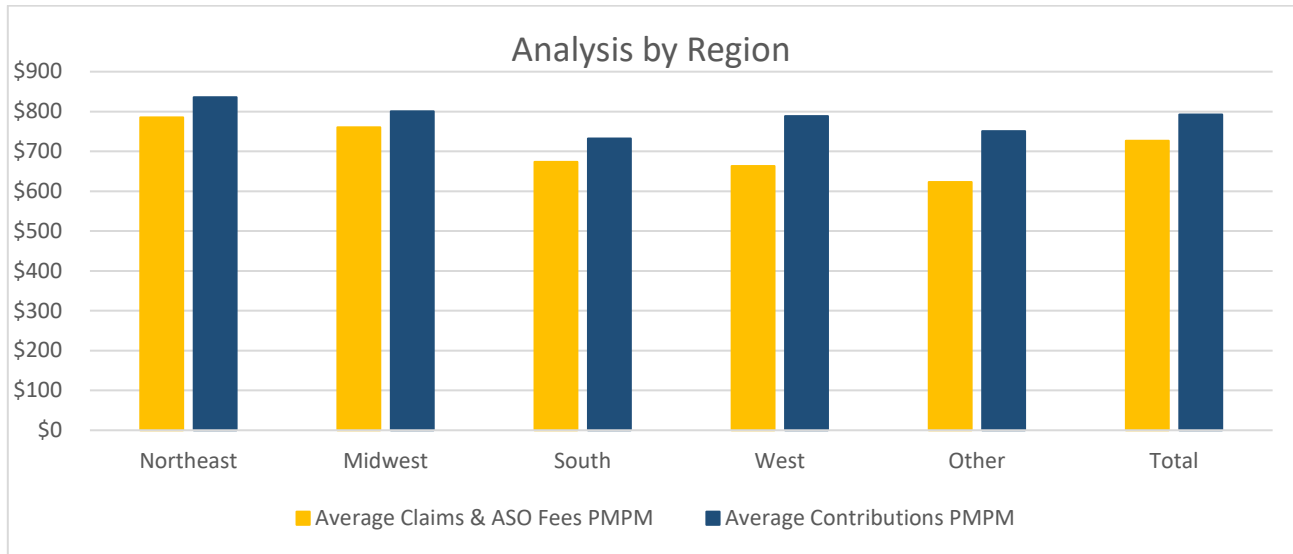
Analysis by Region

The current employee counts, percentage of the employees, and loss ratios for each plan option are included in the following table.

The enrollment is concentrated in the northeast and the south. The loss ratios are lowest in the western part of the country, likely due to the Kaiser plans in that area.

	Northeast	Midwest	South	West	Other	Total
Current Employee Count	5,370	872	3,785	2,085	309	12,421
Employee Distribution	43%	7%	30%	17%	2%	100%
Claim & ASO Fee Loss Ratio	97%	97%	94%	86%	88%	94%

Costs are highest in the Northeast, followed by the Midwest and South.



As shown in the table below, the relative values of the contributions and claims are fairly well aligned in the Northeast, Midwest, and South. However, there is subsidization between those three regions and the West and Other regions.

	Northeast	Midwest	South	West	Other
Contribution Relative Value	1.00	0.96	0.88	0.94	0.90
Claim & ASO Fees Relative Value	1.00	0.97	0.86	0.84	0.79
Rate Change to Remove Subsidy	2.5%	3.7%	0.4%	-8.2%	-9.5%

REVIEW OF VOLUNTARY VS. MANDATORY COVERAGE

Overview

The Episcopal Church requires institutions under their authority to provide coverage through the DHP and subsidize coverage for clergy and lay employees working at least 1,500 hours per year. Employees working between 1,000 and 1,500 hours are eligible for benefits, but employer subsidization is not required.

Institutions affiliated with the Episcopal Church but not under the mandate can provide coverage through the DHP for employees normally scheduled to work at least 1,000 compensated hours per year.

Mandatory coverage has advantages.

- Provides quality medical coverage for the Episcopal Church’s clergy and lay employees.
- Ensures that the DHP has a large membership base, providing economies of scale for purchasing power and lower administrative fees.
- Helps spread the cost of individuals with higher medical needs over a larger risk pool with more individuals with lower medical needs.

There are some benefits to allowing groups to opt out of mandatory coverage.

- Individual dioceses or employer groups may be able to find health coverage outside of the DHP at a lower cost. This can be compounded by reducing the disparity of healthcare premiums among dioceses.
- Mandatory coverage may cause financial strain on employer groups that are struggling to pay the required contributions.

With the current contribution strategy, allowing mandatory groups to opt-out of the DHP coverage would likely cause some of the lower-cost groups to exit the plan. This could lead to an anti-selection spiral where healthier groups leave, increasing contribution rates for the remaining groups and perpetuating the spiral.

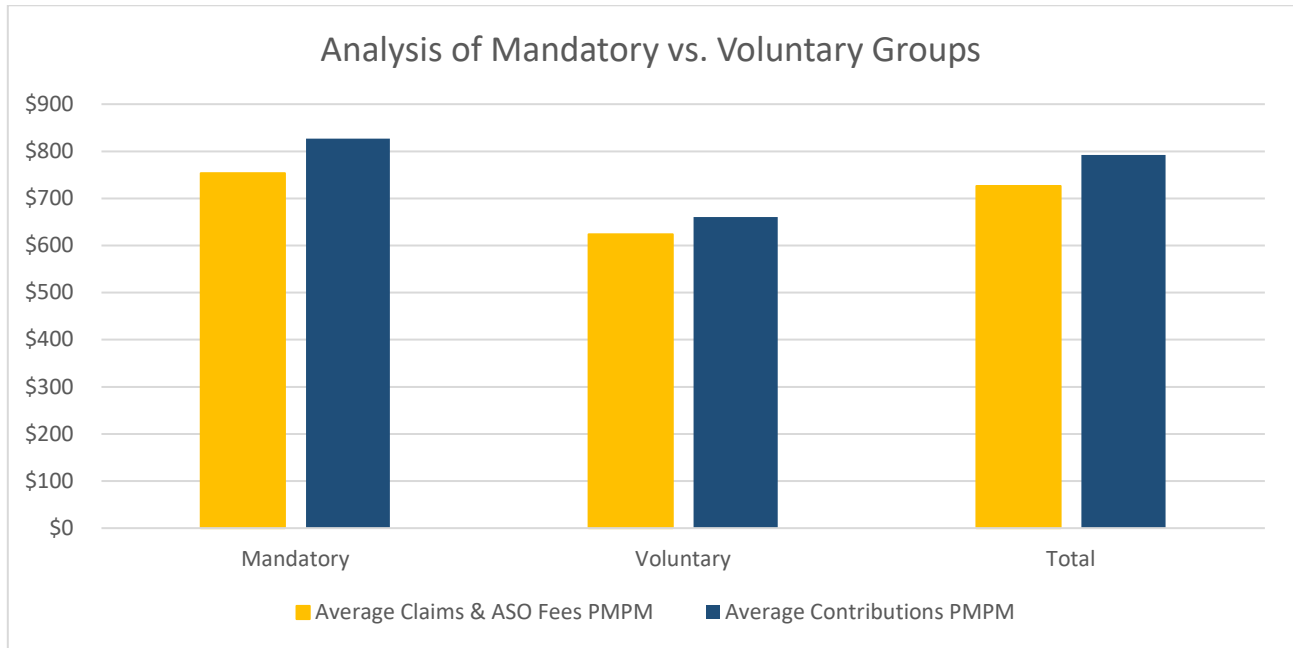
There is a delicate balance between spreading the costs over the entire DHP and making sure the contribution rates are reasonable compared to the outside market.

Analysis of Voluntary and Mandatory Groups

The following table shows that mandatory groups make up almost 80% of the employees. The loss ratio for the mandatory group is slightly lower than the voluntary group.

	Mandatory	Voluntary	Total
Current Employee Count	9,697	2,724	12,421
Employee Distribution	78%	22%	100%
Claim & ASO Fee Loss Ratio	93%	99%	94%

The mandatory groups have higher average claims and contributions per member per month than the voluntary groups. Part of this difference is because the mandatory group has a higher average age.



Looking at the relative value of the contributions and claims, there is no significant subsidization between the mandatory and voluntary groups.

	Mandatory	Voluntary
Contribution Relative Value	1.00	0.80
Claim & ASO Fees Relative Value	1.00	0.83
Rate Change to Remove Subsidy	-0.6%	3.0%

REVIEW OF CLERGY AND LAY EMPLOYEES

Overview

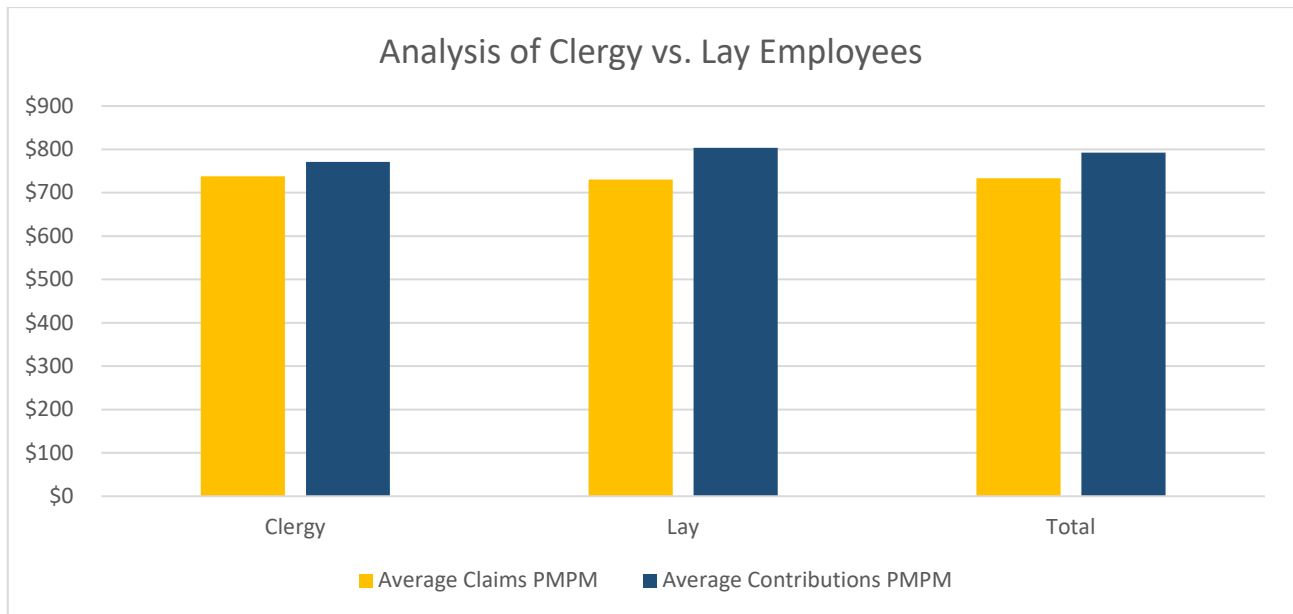
One of the directives from the General Convention was to ensure parity in cost sharing between clergy and lay employees.

Analysis by Clergy and Lay Employees

The lay employees are a large portion of the enrollment, but the loss ratio for clergy is slightly higher.

	Clergy	Lay	Total
Current Employee Count	8,062	15,132	23,194
Employee Distribution	35%	65%	100%
Claim & ASO Fee Loss Ratio	96%	93%	94%

The claims and contributions per member per month are very similar between the two groups.



Looking at the relative value of the contributions and claims, there is a small amount of subsidization between the clergy and lay employees.

	Clergy	Lay
Contribution Relative Value	1.00	1.04
Claim & ASO Fees Relative Value	1.00	1.00
Rate Change to Remove Subsidy	2.8%	-1.4%

REVIEW OF PRE-65 AND POST-65 EMPLOYEES

Overview

Medical costs generally increase with age, and often with significant differences for pre-65 and post-65 employees. As discussed in more detail later in the report, most employees become Medicare eligible at age 65. For most employees, the DHP coverage is primary and pays before Medicare. However, there is an exemption for small employers that Medicare will be primary, with the DHP paying secondary. We are using “DHP primary” to refer to the DHP paying first, then Medicare and “Medicare Primary” where Medicare plays first and then the DHP.

Analysis by Pre-65 and Post-65 Employees

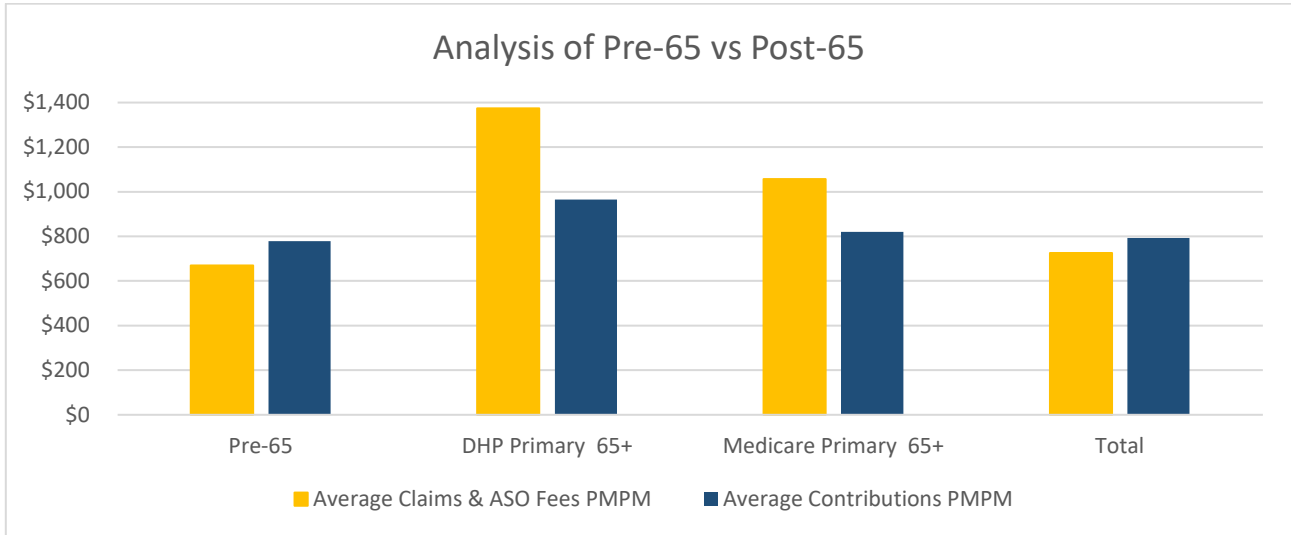
We looked at the premiums and claims for pre-65 employees and post-65 employees split between members where the DHP pays primary and where the DHP pays secondary to Medicare.

The loss ratio for post-65 members is significantly higher than for pre-65 members.

	Pre-65	DHP Primary 65+	Medicare Primary 65+	Total
Current Member Count	21,178	1,574	442	23,194
Member Distribution	91%	7%	2%	100%
Claim & ASO Fee Loss Ratio	88%	145%	133%	94%

In addition to significant differences between pre-65 and post-65 employees, the average claims for post-65, DHP primary members are significantly higher than pre-65 retirees and post-65 Medicare primary members. When Medicare is primary, employer plans typically save between 60% and 70% on claims. The DHP is seeing a savings of approximately 15% for Medicare primary members.

We note that there is a significantly higher proportion of post-65 employees in the two plans with the highest benefits (e.g., PPO 100 and PPO 90): approximately 60% of post-65 employees compared to 40% of pre-65 employees.



A significant increase in the post-65 rates would be necessary to reduce the subsidization between pre-65 and post-65 members.

	Pre-65	DHP Primary 65+	Medicare Primary 65+
Contribution Relative Value	1.00	1.24	1.05
Claim & ASO Fees Relative Value	1.00	2.05	1.58
Rate Change to Remove Subsidy	-6.0%	55.4%	40.7%

There is significant subsidization between pre-65 and post-65 members. For example, claims for DHP primary members are more than double the pre-65 members, but contributions are only 24% higher.

Because of the significant impact of age, it is important to delve deeper into the plan election of employees. The following table shows the benefit option election of employees.

	Pre-65	DHP Primary 65+	Medicare Primary 65+
PPO 100/PPO 90	40%	56%	73%
PPO 80/PPO 70	26%	20%	27%
CDHP Plans	26%	17%	0%
Kaiser EPO Plans	8%	7%	0%

The post-65 employees are overwhelmingly choosing the options with richer benefits. One reason may be because the contribution rates for post-65 employees are too low.

REVIEW OF EMPLOYEE CONTRIBUTIONS AND/OR HSA FUNDING

Each employer group determines the contributions that employees are required to pay for their insurance coverage and any HSA funding for the CDHP plans. The employer groups are not required to share the employee contribution levels with the DHP.

Employee cost-sharing, whether through premium contributions or benefit cost sharing impacts claim utilization. We previously discussed increased utilization when there is very limited benefit cost-sharing. The level of employee premium contributions will impact the employees' choice between benefit options. Low employee contributions combined with low cost-sharing benefit plans can significantly increase the cost of coverage.

The same situation arises when considering HSA funding. The level of employer contributions towards employee HSA accounts impacts whether employees may elect a lower cost high deductible plan vs. a higher cost/low benefit cost-sharing plan.

SECTION III

COST MANAGEMENT

VALUE-BASED INSURANCE DESIGN

One option is to consider value-based insurance designs (“VBID”). The goal of VBID is to decrease the cost of health care while increasing the effectiveness of health services by removing financial and social barriers to essential, high-value services.

The National Pharmaceutical Council and the University of Michigan Center for Value-Based Insurance Design highlight four fundamental approaches in their 2009 Value-Based Insurance Design Landscape Digest¹⁶. Most VBIDs incorporate one or more of these approaches:

- **Design by service**—eliminating or lowering co-payments for certain health care services or medications (e.g., cholesterol tests, asthma drugs), regardless of who uses them.
- **Design by condition**—eliminating or lowering co-payments for patients with specific clinical diagnoses (e.g., hypertension, prediabetes) for related services or medications.
- **Design by condition severity**—eliminating or lowering co-payments for patients who are at high risk of disease (or costly complications) and could benefit from participating in disease management programs.
- **Design by disease management condition**—eliminating or lowering co-payments for high-risk patients who actively participate in disease management programs.

VBID is bigger than just cost sharing. VBID requires coordination between the subscriber, the payer, and provider. For example, consider colon cancer screening. Screenings provide exceptionally high value for subscribers with a first-degree family member diagnosed with colon cancer. Screenings also provide high value for 50-year-olds with average risk; however, they provide low value to a 30-year-old with no family history of colon cancer. Who provides the screening is important as well – a high-performing provider vs. a poor-performing provider. In addition, where the screening is provided significantly impacts the cost of the screening – an ambulatory care center vs. a hospital.

While Kaiser typically does a good job with providers, the DHP may be able to push Anthem and Cigna for more evidence-based, high-quality patient outcomes. Another area is bundled payment approaches, which is contracting that combines pre-and post-procedural care into one negotiated price that can deliver savings and simplify billing for organizations and employers.

The DHP may want to look further into VBID and may be able to leverage the information that will be available through the introduction of the Quantum Health Navigator to determine areas that might be most impactful.

If the Task Force recommends eliminating either the PPO 100 or PPO 90, one idea is to consider enhancing benefits on the remaining plans with a focus on VBID.

One suggestion that is relatively easy to implement is to waive the deductible for maintenance medications where consistency is important such as asthma/COPD, diabetes, blood pressure, cholesterol,

¹⁶ https://www.cdc.gov/nccdphp/dch/pdfs/value_based_ins_design.pdf

emotional/mental disorders, osteoporosis and/or prenatal vitamins. This benefit is allowed for qualified HDHPs where normally the deductible must be met in order to remain qualified under IRS rules. We note that this is not an exhaustive list of conditions allowed under IRS rules.

ACTIVE EMPLOYEES ELIGIBLE FOR MEDICARE

Medicare-Eligible Active Employees

Employees who are eligible for Medicare but still working and receiving health insurance coverage through their employer have several options.

- Keep employer plan and not sign up for Medicare.
- Keep employer plan and sign up for Medicare Part A. There are no premiums for Part A if the individual paid enough Medicare taxes while working.
- Keep employer plan, sign up for Medicare Part A, and sign up for Parts B, D, and/or a Medigap Plan. However, there is a monthly premium for Parts B, D and MediGap.
- Keep employer plan and sign up for Medicare coverage through a Part C plan, which also has a monthly premium.
- Drop employer coverage and sign up for Medicare.

Coordination Between Medicare and Employer Plan

When an individual is covered by more than one medical plan, coordination of benefits rules determine which plan pays first. The “primary payer” pays claims first, based on the primary payer benefits. Then the “secondary payer” will pay if there are costs that the primary payer did not cover.

For active employees in an employer-sponsored plan where the employer has at least 20 full and/or part-time employees, the employer-sponsor plan is the primary payer and Medicare is secondary¹⁷.

If an employer has fewer than 20 full and/or part-time employees, sponsors or contributes to a single-employer group health plan, the Medicare Secondary Payer (“MSP”) rules applicable to individuals entitled to Medicare on the basis of age do not apply to such individuals.

If such an employer participates in a multiple employer or multi-employer plan, such as the DHP, and at least one participating employer has at least 20 full and/or part-time employees, these MSP rules apply to all individuals entitled to Medicare on the basis of age, including those associated with the employer having fewer than 20 employees.

CMS allows multi-employer group health plans to be granted a Small Employer Exception (“SEE”) for participating small employers (less than 20 full and/or part-time employees). Each employer group may apply for the SEE by submitting the required information via an Employee Certification Form for each eligible participant to the Medical Trust. If CMS approves the SEE, eligible employees may choose to participate in the Small Employer Exception Plan (the “SEE Plan”) as administered through the Medical Trust.

¹⁷ For retired employees, Medicare becomes primary, regardless of the employers’ size. However, retirees are not included in our analysis.

Cost-Savings Through Small Employer Exception for Medicare

The SEE Plan can provide significant cost savings for both employers and participating individuals. We typically see savings between 60% and 70% when Medicare is primary. As we noted in the previous section of the report, the DHP savings has only been approximately 15%. In addition, the contributions have not been high enough to cover the losses. The problem is exacerbated by the high enrollment of post-65 employees in the PPO 100 and PPO 90 plans.

Based on discussions with CPG, it is difficult to determine how many employers are eligible for the SEE but have not taken advantage of it. Therefore, it is difficult to quantify the potential savings with more participation. However, the DHP savings could be much higher with changes to benefits and/or contributions.

Cost-Savings Through Education of Larger Employers

As mentioned above, an actively employed, Medicare-eligible employee has several options for health coverage. Depending on the required contributions by the employer, it may be more cost-effective for an employee to drop the employer coverage and elect coverage through Medicare with a MediGap plan or a Medicare Advantage plan.

One important note: an employer **may not** encourage or incentivize an employee to move to Medicare, but there are consultants who work with employees to review and perform a cost-benefit analysis of the options available to Medicare-eligible employees. Not only can this type of service assist employees in making informed decisions but can also result in savings to the employee, the employer, and the DHP.

SPECIALTY DRUGS AND GENE THERAPY

Specialty Drugs

Specialty drugs are high-cost medications that treat rare, complex, and chronic health conditions. The drugs themselves may require special handling, and patients who use them may need to work closely with doctors, pharmacists, and other health care providers who can monitor their progress.

Gene Therapy

Gene therapy is a new generation of medicine where a functioning gene is delivered to a targeted tissue in the body to produce missing or nonfunctioning protein.

Gene therapy targets the underlying cause of genetic diseases, which are caused by alterations in a person's DNA. This type of treatment has the potential to provide clinical benefits that transform and dramatically improve a patient's quality of life. Our focus is on therapies that are administered on a one-time basis and are potentially curative.

While the impact to patient health can be life-changing, it comes at a significant price tag. Two examples are Luxturna which treats a rare form of inherited vision loss and Zolgensma which treats certain forms of spinal muscular atrophy. When Luxturna launched it had a cost of \$425,000 per eye and Zolgensma launched at \$2.125 million. In late November 2022, the FDA approved Hemgenix, the first gene therapy for hemophilia B and has a record-setting price tag of \$3.5 million.

While these new therapies can provide life-preserving and life-saving benefits, they can cause financial strain. Members, health plans, pharmacy benefit managers, plan sponsors and reinsurers are wrestling with how to provide these therapies in a way that is affordable and ensures the best outcomes.

CVS Health publishes a quarterly report¹⁸ for the projected treatments and approval timelines for the gene therapy pipeline. New gene therapies are expected to treat conditions that affect larger populations starting in mid-2024 and beyond, including,

- Diabetic peripheral neuropathy (impacting between 5 and 11 million adults in the US),
- Neovascular age-related macular degeneration (impacting approximately 1 million US adults), and
- Knee osteoarthritis (affecting 16 million US adults).

Tracking the gene therapy pipeline is increasingly critical as the potential for gene therapy grows, so that the DHP can be proactive in developing strategies to manage access and cost.

Some stop-loss carriers are lasering¹⁹ individuals who may be candidates for the gene therapy drugs which exposes self-funded plans to significant risk.

Specialty and Gene Therapy Solutions

The DHP is utilizing SaveOnSP program through Express Scripts to save on certain specialty drugs by maximizing copay assistance programs that are available from drug manufacturers. However, only certain drugs are covered. If the DHP decides to forgo stop-loss insurance, this type of coverage will not be available through most channels. However, Express Scripts has a program called Embarq Benefit Protection which is a solution for gene therapy which may be an option for the DHP.

Innovative payment approaches will play an important role in making gene therapy treatments more accessible and more affordable. Two potential approaches consider:

- Evolving the role of a specialty pharmacy: Having specialty pharmacies purchase gene therapies directly from the manufacturer is an opportunity to reduce the cost impact and avoid the risks of markup.
- Value-based contracting (previously discussed as VBID): Gene therapies are good candidates for value-based contracting, where reimbursement is tied to expected durable outcomes.

Some drug manufacturers are considering warranties. For example, Roctavian was approved by the FDA in June 2023 and is the first gene therapy approved in the U.S. for certain patients with hemophilia A. The list price is \$2.9 million per single-use. The manufacturer, BioMarin, plans to offer a warranty in the U.S. and refund the payer if the patient must revert to prophylaxis treatment within a certain period of time.

¹⁸ <https://payorsolutions.cvshealth.com/sites/default/files/Q2%202023%20REPORT%20Gene%20Therapies%20-%20CVS%20Health.pdf>

¹⁹ A laser assigns a higher specific deductible to plan members with a higher predisposition for illness or healthcare costs, rather than raising the deductible for all.

NETWORK CONFIGURATIONS

There are several changes that can be considered with provider networks.

Tiered Networks

In a tiered network, the plan divides the providers in its network into two or more distinct groups, typically based on the cost effectiveness and/or quality of the care they provide. Tiering may be used for all types of providers or may be limited to select categories such as hospitals or specialists. Most employers electing to contract with a plan with a tiered network say the selection of providers into tiers is based on both costs and quality.

Narrow Networks

Another, more aggressive strategy that health plans use to direct enrollees to more cost-effective providers is to create a network that is restricted only to a limited number of providers that agree to meet relatively stringent cost and/or quality objectives. These plans, often referred to as narrow network plans, have been found to significantly lower premiums and overall spending without necessarily harming access to care, even though fewer providers are covered.

Centers of Excellence

Health plans can designate specific facilities as Centers of Excellence if they provide very high quality or low-cost care, often times for a particular service. The plan will then encourage workers to receive care for select procedures, such as transplants, at these facilities by offering significantly lower cost sharing than is otherwise available at their in-network hospitals. Some employers, particularly very large ones, have seen drastic reductions in unnecessary care and expenses after adopting Centers of Excellence.

Employer Direct Contracting with Health Care Providers

Some employers look beyond the network established by their health plan or administrator and contract directly with hospitals, health systems, or clinics to provide services for certain conditions. These arrangements are available to self-funded firms and are negotiated independent of their health plan. An employer may choose to contract directly with a provider or system of providers if it can negotiate a better deal or get better service than it would through its health plan network. An employer with a substantial number of employees may be able to negotiate for favorable prices, shared-risk arrangements, or may gain access to additional services or data.

Direct contracting might be difficult, given that the members are spread across the country, but focusing on some key areas with larger membership might be an option.

ALTERNATIVE PAYMENT MODELS

Innovative approaches like membership-based primary care models aim to address the costly waste in healthcare by realigning provider incentives toward quality outcomes and delivering value-based care. The two types of membership models are concierge medicine and direct primary care.

Concierge medicine was developed as an alternative to volume-based care models to give physicians more time with patients. However, it can be cost-prohibitive for some populations, though, since a patient generally pays a membership fee to the practice as well as insurance copays.

With direct primary care, physicians are paid directly by the patient or their employer, eliminating the need for using insurance for primary care services.

Both models increase the time a patient has with their provider, putting more focus on disease prevention. Each model also often includes a virtual care element that enables higher-touch patient care.

STOP-LOSS COVERAGE

Unlike an employer who purchases a fully insured plan from an insurance company, an employer who self-funds takes on all the responsibility and risk that a fully insured employer has transferred to the insurance company, as is the case with the DHP. Self-funding leaves the employer at significant risk for “shock claims” (i.e., high dollar but low frequency claims, such as an organ transplant) and high utilization claims (i.e., low dollar but unusually high frequency claims). A self-funded employer may transfer some of its risk of loss to a stop-loss insurer by purchasing a stop-loss insurance policy.

A stop loss insurance policy usually contains two components: 1) a specific “attachment point” (or “retention level”) that protects against claim severity; and 2) an aggregate attachment point that protects against claim frequency. The policy’s specific coverage provides protection in the case of a single covered individual with a high dollar claim or series of claims. Any costs exceeding the specific attachment point are covered by the stop loss policy. The aggregate coverage provides protection against the cumulative impact of smaller claims that may never meet the threshold of a specific attachment point. Once the employer’s total claims payments (not counting any claims paid by the specific coverage) reach the aggregate attachment point, the stop loss policy covers all remaining costs for the year (up to the policy limit, if any).

The DHP’s current stop-loss policy includes a \$1 million specific attachment point with no aggregate stop-loss coverage; however, it is our understanding that the DHP does not plan to renew this coverage for 2024. While there will be immediate savings from the lack of stop-loss premiums, the DHP will bear the entire risk of the previously discussed shock claims that have the potential to have a significant impact on the Plan. This should be meticulously monitored during the upcoming plan year with consideration given as to whether stop-loss coverage should be re-instituted in future years based on emerging claims experience.

SECTION IV

RESERVES AND SURPLUS LEVELS

RISK BASED CAPITAL OVERVIEW

Risk Based Capital (“RBC”) is a method developed by the National Association of Insurance Commissioners (“NAIC”) to measure the minimum amount of capital that an insurance company needs to support its overall business operations. RBC is used to set capital requirements considering the size and degree of risk taken by the insurer. As the current measurement stands, there are four major categories of risk that must be measured to arrive at an overall RBC amount.

- Asset risk: This is a measure of an asset's default of principal or interest or fluctuation in market value as a result of changes in the market.
- Credit risk: This is a measure of the default risk on amounts that are due from policyholders, reinsurers, or creditors.
- Underwriting risk: This is a measure of the risk that arises from underestimating the liabilities from business already written or inadequate pricing on current or prospective business.
- Off-balance sheet risk: This is a measure of risk due to excessive rates of growth, contingent liabilities, or other items not reflected on the balance sheet.

The RBC formula establishes a hypothetical minimum capital level that is compared to a company's actual capital level. The formula is used to derive a measure of "minimum capital" that an insurer would be expected to hold based on the types of risk to which the company is exposed. Recognizing these risks will differ, sometimes significantly, based on the type of insurance that the NAIC has adopted. There is a specific formula for health companies.

The RBC model generates required capital levels for each of these risk categories. These capital requirements are then aggregated, and the minimum capital level that a company must maintain to avoid regulatory action is produced.

It is common for self-insured programs that are not subject to the RBC test to consult with their actuaries, auditors, brokers, or managers to run the test for them and report on the results.

OVERVIEW OF DHP PROCESS

As a non-regulated entity, the DHP does not have to adhere to the RBC requirements promulgated by the NAIC; however, the DHP does set its target capital position in the range of 125% to 175% of its calculated RBC using industry standard methods. As mentioned in the previous section, the DHP will discontinue individual stop-loss reinsurance coverage effective 1/1/2024, as its capital position has stabilized at the upper end of the target range and will be used to handle large claims volatility.

The following table (reported in \$1,000's) provides a comparison of targeted vs. reported capital for 2019 through 6/30/2023.

	2019	2020	2021	2022	2Q2023
Targeted Capital	\$35,342	33,500	40,242	35,280	43,295
Reported Capital	35,139	68,546	53,777	37,986	42,200
% of Targeted	99%	205%	134%	108%	97%

The increase in capital in 2020 and 2021 was primarily due to the pandemic which dampened claims utilization (i.e., fewer claims). This enabled the DHP to soften rate increases in 2022 and 2023. In addition, the 2023 increase in reported capital was due to operating income and unrealized gains in the investment portfolio, as the market recovered during the first six months of 2023.

As has continued to be the case for the DHP, the most significant risks to capital moving forward are pricing, claim costs (especially now with the termination of the stop-loss arrangement), and the volatility in the investment portfolio.

APPENDICES

APPENDIX A
SUMMARY OF DHP BENEFITS

From Excel

APPENDIX B
RELIGIOUS ORGANIZATION BENEFIT COMPARISON

The following table provides a very brief overview of the benefit ranges for each organization based on publicly available information. The cost-sharing varies, depending on the plan.

Organization	Employee Only In-Network Deductible	In-Network Coinsurance	Employee Only Out-of-Pocket Maximum	Primary Care	Specialist	Prescription Drugs ²⁰	Plan Types	Plans Offered
Baptist Health	\$300 - \$1,000	Copay Only	\$2,000 / \$4,000	\$0	\$15 - \$40	\$15 - \$75	POS, PPO	3
Concordia Plans	\$0 - \$6,000	20%	\$1,500 - \$8,550	\$20 - \$35 or Ded & Coins	\$20 - \$65 or Ded & Coins	\$10 - \$100 or Ded & Coins	HDHP, HMO	15
Evangelical Covenant Church	\$400 - \$6,250	10% - 42%	\$2,750 - \$6,250	\$20 - \$35 or Ded & Coins	\$20 - \$45 or Ded & Coins	\$8 - \$125	PPO	3
Evangelical Lutheran Church of America (Portico)	\$550 - \$5,000	20%	\$3,400 - \$6,800	Ded & Coins	Ded & Coins	\$12 - \$180 or Ded & Coins	HDHP, POS	6
Evangelical Presbyterian Church	\$450 - \$6,200	10% - 40%	\$2,800 - \$6,750	\$25 - \$60 or Ded & Coins	\$20 - \$50 or Ded & Coins	\$10 - \$500 or Ded & Coins	HDHP, PPO	5
GuideStone	\$0 - \$18,000	0% - 30%	\$3,000 - \$40,000	\$0 - \$25 or Ded & Coins	\$45 - \$70 or Ded & Coins	\$15 - \$150 or Ded & Coins	HDHP, EPO, PPO	41
Pension Boards of United Church of Christ	\$300 - \$1,000	20% - 30%	\$2,000 - \$6,000	\$25 or Ded & Coins	\$25 or Ded & Coins	\$17 - \$45 or Ded & Coins	PPO	4
The Reformed Church in America	\$500 - 3,000	0% - 20%	\$5,000	\$20 - \$75 or Ded & Coins	\$20 - \$75 or Ded & Coins	\$10 - \$150	PPO, HDHP	3
Reta Smaller Trustor (Catholic)	\$500 - \$2,500	10% - 20%	\$2,500 - \$14,000	\$25 or Ded & Coins	\$40 or Ded & Coins	\$10 - \$40	PPO, EPO, HDHP	4
United Methodist Church (Wespath)	\$500 - 3,000	0% - 50%	\$5,000	\$20 - \$75 or Ded & Coins	\$20 - \$75 or Ded & Coins	\$10 - \$150 or Ded & Coins	PPO, HDHP	6

²⁰ Retail 30-day supply

APPENDIX C
RELIGIOUS ORGANIZATION BENEFIT EXAMPLES

TASK FORCE TO REVISE THE PAROCHIAL REPORT FINANCE PAGE

Members

The Rev. Kate Wesch, Chair	Connecticut, I	2024
Ms. Erika Brewer, Secretary	New York, II	2024
Ms. Elisabeth Brauza-Hughes	Western New York , II	2024
The Rev. Millard Cook	Bethlehem, III	2024
The Rev. Nathaniel Darville	Newark, II	2024
Mr. John Edgar, Vice Chair	Southwest Florida, IV	2024
The Rev. Jeremiah Griffin	Rio Grande, VII	2024
Mr. Adam Lees	Alaska, VIII	2024
The Rev. Carlos Rendon*	Colombia, IX	2024
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2024

*During the work of the Task Force, The Rev. Carlos Rendon changed canonical residence from Colombia, IX, to Long Island, New York II.

Representation at General Convention

Alternate Deputies Elisabeth Brauza-Hughes, Adam Lees, and The Rev. Jeremiah Griffin are authorized to receive non-substantive amendments to this Report at the General Convention.

Mandate

2022 - A155 Revising the Parochial Report Finance Page

Resolved, That the 80th General Convention authorizes the creation of a task force of congregational treasurers and diocesan financial officers to revise the finance page of the parochial report; and be it further

Resolved, That the Presiding Bishop and President of the House of Deputies appoint between 12 and 18 people to serve as members of this task force, to include representatives from every province of The Episcopal Church, and include at least 6 congregational treasurers, one of whom should be from a congregation with an Average Sunday Attendance (ASA) less than 50; and be it further

Resolved, That the President of House Deputies is encouraged to include as an additional member one who has served on the most recent House of Deputies State of the Church Committee; and be it further

Resolved, That the task force consult with the General Convention Office; and be it further

Resolved, That the task force collect and utilize data on diocesan-level use of parochial reports to determine diocesan assessments and apportionment; consider issues of currency conversion for international dioceses; evaluate current requirements on calculating and reporting operating income and expenses, and be it further

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

Resolved, That this task force will make a report to the 81st General Convention.

Summary of Work

The Task Force met monthly on Zoom between January and September 2023.

The Task Force used the Listening, Action, Reflection Change Process Model, infused with Benedictine spirituality (Stability, Obedience, Conversion of Life) from the College for Congregational Development to do this work.

The Task Force designed a survey sent to each of the 110 diocesan Canons for Finance on their use of the Parochial Report finance pages and their thoughts about its effectiveness for their use in planning and budgeting.

The Task Force reached out individually to each diocese to encourage their response to the survey. We also followed up to non-responding dioceses again requesting their participation.

The Task Force reached out individually to Province IX Dioceses to encourage their participation.

The Task Force hosted two Zoom sessions for Diocesan Canons during which members of the Task Force, using prepared questions, discussed with them their use of the current financial pages and received their feedback on possible changes.

Taylor Hartson of the University of Notre Dame analyzed and provided a summary of survey and listening session results.

The Task Force analyzed the impact of its recommendations on the calculation of amounts due from parishes to their dioceses using historical data provided by GCO.

The Task Force gathered from October 9-11 at the Joint Interim Bodies Meeting in Maryland to finalize its Blue Book report and the revised Financial Pages of the Parochial Report.

The Task Force submitted its proposed revised financial pages to the State of the Church Committee with the intention that they present them to the Executive Council at its January 26-29, 2024 meeting in Louisville, Kentucky.

Recommendations

Many responders noted that the current report due date does not allow sufficient time for their churches to complete accurate, final, Vestry-approved year-end financial numbers. Consequently the quality of data submitted will be improved if the due date is moved from its current March 1 for churches/May 1 for Dioceses to a later date in the calendar. We recommend the Standing Commission on Structure, Governance, Constitution and Canons examine this issue of financial reporting deadlines in the next triennium.

The Task Force recommends a future group study the implications of financial reporting and related interaction with international churches, especially those where banking regulations diverge from US and European customs.

Supplementary Materials

- Task Force A155 recommended revised financial pages of the Parochial Report
- Listening, Action, Reflection Change Process Model, The Diocese of Olympia and the College for Congregational Development

Task Force A155 recommended revised financial pages of the Parochial Report

*Please indicate reporting currency: _____

Stewardship	
1. Number of Confirmed Pledges to General/Operating Fund	
2. Monetary Amount of Confirmed Pledges	
Income	
3. Plate, Pledge, and other contributions for the general support of the church	
4. Contributions for specific purposes (designated contributions)	
5. All Other Income	
TOTAL INCOME:	
Expenses	
6. Administrative Expenses (personnel, utilities, office, etc.)	
7. Mission & Programming Expenses	
8. Church Capital Expenses	
9. All Other Expenses	
TOTAL EXPENSES:	
Year End (as of December 31)	
10. All Cash, Checking, & Savings balances	
11. Market Value of all Investments	

Supplemental Information:

If you check "Yes," please complete follow-up questions. If "No," continue to the next question.

12. Does your congregation have an endowment or other investment account?

___ Yes ___ No

- 12a: What was your percentage draw for 2023? _____

- 12b: How did the overall value of your endowment change from 2022 to 2023?

Increased _____ Stayed the Same _____ Decreased _____

13. Does your congregation have any outstanding debt, including credit card debt?

___ Yes ___ No

- 13a: How much? _____

- 13b: What is the debt for?

14. Does your congregation own buildings and/or land? ___ Yes ___ No

15. Does your congregation rent or lease all or a portion of your building(s) or land?

___ Yes ___ No

- 15a: How much income did your church earn from rentals or leasing? _____

- 15b: What expenses did your church incur from rentals or leasing? _____

**Note: We recommend retaining the current currency reporting method.*

**CHANGE PROCESS 2:
LISTENING – ACTION – REFLECTION CHANGE PROCESS**

Form a team to guide the process.

Pray for guidance.

Identify a focus area for learning or improvement in the congregation.



Plan a listening process/inquiry into the focus area.

Plan to include the Benedictine background and the idea of listening as a part of congregational discernment.



Conduct listening process/inquiry into the focus area.

Use Benedictine background as an introduction.
Assist everyone in listening for insights and themes.



Reflect with those who are a part of the inquiry:

What was discovered/what did we learn?
What are the alternatives for action?
What action do we have energy for?
How might we be turning to Christ through this action?



Plan, organize, and take the action.



Reflect with others on what taking the action taught us.

Can be about the focus area, the congregation, or ourselves.
Out of this, potentially choose a new area of focus
and repeat all or part of the cycle.



FIGURE A-19: LISTENING -REFLECTION CHANGE PROCESS

With thanks to The Diocese of Olympia and the College for Congregational Development

<https://www.cdcollege.org/>

TASK FORCE TO STUDY CONGREGATIONAL VITALITY

INDICATORS

Members

The Rt. Rev. C. Andrew Doyle, Chair	Texas, VII,	2024
Mrs. Kate Bond, Secretary	Oklahoma, VII,	2024
Mrs. Michael Funston	Kansas, VII,	2024
Mr. Stephan Griffin	Massachusetts, I,	2024
The Rev. Sunny Hallanan	Convocation of Episcopal Churches in Europe, II	2024
The Rev. Debra Maconaughey	Florida, IV,	2024
The Rev. Dr. Deacon Laura Natta	California, VIII,	2024
Ms. Phillips Smith	East Carolina, IV,	2024
The Rev. Dr. Angela F. Shepherd	Atlanta, IV,	2024
The Rev. Juan Valderrama	Colombia, IX,	2024
Ms. Ayala Harris, Ex Officio	Oklahoma, VII,	2024
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV,	2024

Mandate

The House of Deputies Committee on the State of the Church proposed to General Convention 2021, A132, which was adopted by both houses and created the “Task Force to Study Congregational Vitality Indicators.” The mandate was to work closely with the Task Force on the State of Membership in The Episcopal Church (A156) and the House of Deputies State of the Church Committee. The mandate was also to coordinate with the House of Deputies Committee on the State of the Church to ensure that the parochial report form is revised to collect data from congregations that will measure vitality in the 21st century. Finally, the task force was to issue a report to the 81st General Convention that includes proposed canonical changes to codify the proposed measurements.

Summary of Work

The Task Force introduced itself online and prepared for our meeting at the Maritime Institute and Conference Center. The Task Force met in person on April 24-26. At that meeting the following studies were discussed: the history of the Parochial Report, the history of Canon 5, the history of General Convention actions that referred to the term “vitality” and the recommendations of previous reports

to the State of the Church Committee and General Convention. An understanding of the process of developing the present parochial report questions was understood. The Rev. Molly James, from the General Convention Office, attended and spoke with members regarding possible changes to the report. The committee finished its time in Maryland by drafting a report. The Task Force spent the remaining time online using Teams to fine tune the report in connection with data received from two other task forces on membership and finances, and The Committee of the State of the Church.

Report

The interim body Task Force to Study Congregational Vitality Indicators is not the first Episcopal Church entity tasked with determining what is “congregational vitality” and what are its indicators. This task force, and its related interim bodies, is given the responsibility of bringing forward history and recent conversation regarding the nature of the vitality of the Episcopal Church and to make suggestions in the form of a report and resolutions to be considered at the 181st General Convention of the Episcopal Church, meeting in Louisville Kentucky in 2024.

History of the Parochial Report:

In the wake of the Revolutionary War, the emerging Episcopal Church had a great concern regarding the funding of mission. The Anglican Church in the colonies had been funded through the office of the Bishop of London. Following the conclusion of the Revolutionary War, churches quickly began to find themselves disestablished without the reliability of tax contributions to fund clergy and consolidated structures. In addition, the Episcopal Church experienced an increased need to fund mission, structure, bishops, and education. Viability became a primary concern as apathy and discouragement in these early years was prevalent. Discussions about membership, financial resources, and pastoral offices became important as part of the new measurements in the coming years. The first standardized attempt to collect data was created in 1804, data was collected at diocesan conventions from congregations and was collated at General Convention, where the whole was put into the form of a “pastoral letter” conveying general information about the state of the church. This pastoral letter was to be read on a Sunday morning in all the parishes to provide every member with a “full and accurate view” of the church for mission and ministry. Over the next sixty years, the reports became more formal including requirements of metrics and statistics, including ministry, demographic, and financial data. After the Civil War, another moment of change occurred when the mission required rethinking of canonical structure and new forms of accounting and measurements came into fashion. Throughout the late 19th century and 20th century, other changes and reviews of the Parochial Report came into being and the report itself became formalized and institutionalized as the primary means for gathering data about the ministry, mission, and status of congregations across the Episcopal Church. Many of these responses were in response to the changing contexts and realities facing the Church.

We recognize from time to time the Episcopal Church must make changes to the Parochial Report. We see a pattern of change throughout its history responding to new realities for funding for the purpose of local mission, emerging contexts, and structural changes.

Modern Responses:

Today, the Episcopal Church is facing many of the same realities including how best to support and fund local missions, the concern over the rising cost of wider church structures, and contextual changes in the mission field. These are discussions held everywhere in the church from vestry meetings to General Convention. Such trends are accompanied by a desire for new mission practices, ministries that do not fit the confines of our existing structures, and the imperative to address the institutional and structural legacy of slavery, racism, and misogyny. The 2015, 2018, and 2022 State of the Church Reports have highlighted the parallel need to accompany these other discussions with a review of the Parochial Report.

Specific to our work in this Task Force, we received, and reprint here, a portion of the 2015 State of the Church excerpt on Assessing Congregational Vitality. iv The Report on the 2015 State of the Church suggests, the core of what we should be considering, including through measurement and assessment is congregational well-being, defined as whether our congregations are healthy, vigorous, sustainable, robust, thriving, and flourishing? Most interesting is the report's finding that key to this work are the following considerations:

1. Examination of the internal and external contextual phenomena
2. More research utilizing narrative data must be undertaken
3. The 5th page addition to the parochial report is one important way for dioceses and the wider church to collect local narratives and test for vitality through vision or covenant documents, narrative, sharing of stories, or development

The 2015 report continues by suggesting there is a desire to move towards better description, measurements, and processes than previous attempts. Further, they note, “the questions placed before us by the State of the Church Committee are the following:

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

Continuing this work, the 2018 House of Deputies Committee on the State of the Church took a wider view of social and cultural impact assessments and the improved use of the networking and asset mapping work of the wider church office among other things. They also recommended the following resolution.

RESOLUTION 2018-A053: DESIGN A NEW PAROCHIAL REPORT Resolved, that the 79th General Convention charge the House of Deputies Committee on the State of the Church to work with the Office of the General Convention and Executive Council to design a new parochial report appropriate to the current context of the Episcopal Church including but not exclusive to multicultural congregations; aging populations; outposts of ministry in challenging economic contexts; and creative use of space and local engagement, to be administered and shared in networked, visible tools such as the Episcopal Asset Map.

The work of the 2022 House of Deputies Committee on the State of the Church took up additional work on the parochial report. “A primary goal of our committee has been to create a parochial report that would measure lead metrics and indicators of vitality, rather than only trailing metrics that indicate what happened in the past. Our hope has been to create a parochial report that can help guide decisions for the future, not simply report on what has already happened.” They remark on the over-importance our focus on measurement has played in defining what matters to us in the church. Unfortunately, progress was interrupted by the Covid-19 pandemic and while some of the work was begun, much was left unfinished as we arrived at our 80th General Convention in 2022.

The interim body Task Force to Study Congregational Vitality Indicators agrees with much of what has already been noted about this work regarding the parochial report.

We reaffirm and restate, with post COVID pandemic insight, the following:

1. Our research and conversation made it clear that “vitality” itself is a complex term with a correspondingly complex set of indicators. However, we believe that at the core of congregational vitality is spiritual vitality. Specifically, this is rooted in our faith in God and how we encounter God’s mission in our own lives.
2. We believe that every age of Episcopal Church mission requires an assessment of context, ministry, and mission financing. We believe that we are in such a time. Moreover, that such an evaluation must be done on a continuing basis – testing our assumptions and seeking wisdom from mission insights and new technologies.
3. We believe that we should continue to measure the basic trends which are the oldest: income of congregations and diocese, baptized and confirmed membership, Christmas and Easter attendance, Average Sunday Attendance, with the addition of Average Weekly Attendance, the pastoral offices (burial, marriage, etc.), and deaths (which is different from burials).

4. That the 5th page should continue to be used, with aid to diocesan formation of questions. We suggest that the General Convention Office seek to provide coaching on questions contextually to provide insight.
5. We believe from time to time the parochial report should be revised:
 - a. We believe we should continue to test outreach numbers for a minimum of a decade.
 - b. We believe we should incorporate the racial justice questions presently being gathered separately at the diocesan level.
 - c. We believe we should incorporate diocesan institutions (schools, outreach/service ministries, campus missions, summer camps and conference center programs, and missional life (house churches, dinner churches, missional communities, etc.)
 - d. In conversation with Scott Thumma of the FACTS and the General Convention Office, we believe they must help the church edit the questions in the parochial report. These suggestions should be given to the Committee on the State of the Church and Executive Council prior to the end of the next Triennium.
6. We believe that understanding the phenomenology of church is essential and that narrative story telling about how the Gospel is shaping our internal and external mission is essential to our future. We believe a phenomenological approach created using experts from social science along with religious experts, can develop a vitality index for The Episcopal Church, separate from that of the parochial report. Alongside the metrics presently captured in the parochial report we would have a more “accurate view” of the church.
7. We encourage the Office of the General Convention and the Executive Council to continue to work with Faith Communities Today (FACTS), an inter-denominational research cooperative, as well as other experts in the field of congregational vitality.

Conclusion:

We do believe that if the wider church is to have the parochial report work be important it must stop the messaging that it is a “rite of passage” or “duty to be performed” and must communicate a theology rooted in the Gospel imperative of the living loving Lord which calls us to understand our reporting as a transparent way of celebrating our work.

We believe that the work of understanding our ministry can be an opportunity for renewal and celebration of our good work.

A reading of the history reveals that the purpose was not merely to figure out funding and structure, but there is a clear suggestion that part of the work was to reveal the vitality of the emerging church after the revolution. It is no coincidence in a time of unsettlement, post-COVID recovery, economic uncertainty, racial justice, and a desire to emphasize mission that we come to this moment. Therefore, we urge the House of Deputies’ Committee on the State of the Church, the church’s Executive Council

to move forward on both parochial report changes and a phenomenological approach to revealing the Gospel that is even now rooted across our church.

What is clear based upon our time as a Task Force is that it is not the work of church structure to address issues of congregational vitality, and that while we believe the work can and ought to be done, a Task Force is the inappropriate level of governance to adequately address issues of vitality.

Proposed Resolutions

A067 Rebranding the Parochial Report

Resolved, That the 81st General Convention commends the rebranding of the Parochial Report to the Executive Council; and be it further

Resolved, That the General Convention Office continue to work with the Executive Council and other partners to refine the parochial report form by asking better, more precise, and fewer questions; and be it further

Resolved, That the General Convention commend Bishops, Diocesan structures, lay leaders, clergy, outside organizations, and experts in the field to commence this work outside of the parochial report process, including use of Page 5 of the parochial report form to ask questions specific to the Diocesan context; and be it further

Resolved, That the General Convention commend the open sharing and collaboration of information, data, research, and findings on congregational vitality across the church.

EXPLANATION

The Episcopal Church website describes the parochial report as a “rite of passage.” There is in the church a terror of filling out the parochial report. Some even have names for it that do not lift it up as a tool for knowing ourselves, congregations, and mission. Some make jokes about where the 3,000 in Acts were recorded.

We often begin the discourse about the parochial report with disparaging comments about numbers and their lack of importance to the Gospel mission. Yet, the goal is to make each of us aware of the good work we share in across the Episcopal Church revealing the impact we have upon the lives of our parishioners and those in the wider communities in which we find our diverse missionary efforts.

We can even envision using the process of preparing the report as a tool for enhancing a congregation’s vitality.

The Task Force to Study Congregational Vitality Indicators does not believe that we can continue to make changes without considering the message that is sent with those changes. A new concern for narrative vitality, how the church and its interdependent agencies, and our collective mission we must rethink and communicate differently about our reasons for the parochial report.

Canonically this does not require a change, but an action by the office of General Convention with the wider communications office to communicate the hope that is within us as we share with joy the good news of mission at every outpost within the church.

We recognize as a Task Force that the wider church has added to the parochial report without removing questions. One interviewee pointed out that we have been very good at asking newer more relevant questions. Rebranding will not be enough to show the wider church that structures are listening to them. We will need to address fewer, more concise, and particular questions. We understand that the State of the Church Committee is working on the next parochial report, however, the trend towards better care of time is essential. As of the writing of this report the following are required by churches and dioceses: parochial report with its new outreach section and 5th page, the racial justice audit, safe church audit, and a host of committee and task force surveys inviting church opinion. We must decrease our gathered information to those things which help us get an accurate view of the “state of the church” being mindful that the church wide, diocesan, and local congregations experience different needs for information gathering and dissemination.

TASK FORCE TO STUDY HOUSEHOLD AND RELATIONSHIP DIVERSITY

Members

Connor Crafton-Tempel, Co-Chair	Virginia, III	2027
The Rev. Sarah Dunn, Co-Chair	Nevada, VIII	2027
The Rt. Rev. Matthew Cowden	West Virginia, III	2027
Dr. Bryan Dougan	North Carolina, IV	2027
Mr. Fred Ellis	Dallas, VII	2027
The Rev. Charles Graves	Texas, VII	2027
Mr. Scott Haight	West Tennessee, IV	2027
Dr. Adam Hamilton-Ferguson	Central New York, II	2027
Ryan Hawthorne	Texas, VII	2027
The Rt. Rev. Chilton Knudsen	Maryland, III	2027
The Rev. Beckett Leclair	Eastern Michigan, V	2027
The Rt. Rev. Jennifer Reddall	Arizona, VIII	2027
Dr. Melissa Shirley	Southern Ohio, V	2027
Ms. April Thomson	Olympia, VIII	2027
Ms. Julia Ayala Harris, Ex Officio	Oklahoma, VII	2027
The Most Rev. Michael Curry, Ex Officio	North Carolina, IV	2024

Representation at General Convention

The Rt. Rev. Matthew Cowden	The Rt. Rev. Chilton Knudsen
The Rev. Charles Graves	The Rt. Rev. Jennifer Reddall
Mr. Scott Haight	

Mandate

2022 - D073 Task Force to Study Household & Relationship Diversity

Resolved, That the 80th General Convention acknowledge that by our Baptism Episcopalians and all Christians are “[received] into the household of God”(BCP 308) and that all are called to reflect that household in the patterning of our own families; and that all clergy are called to “pattern [their] life [and...household...] in accordance with the teachings of Christ so that [they] may be a wholesome example to all people” (BCP 544), and be it further

Resolved, That this Convention acknowledge that many diverse types of families and households exist among members across the Episcopal Church, both laity and clergy; and be it further

Resolved, That the 80th General Convention authorize a Task Force on Relationship Diversity to create opportunities for discussion, reflection and deepening of understanding about existing diversity of family relationships & households among congregations, dioceses and throughout the Episcopal Church; and be it further

Resolved, That this Task Force shall engage in prayer, review, and theological study around the diverse types of families, households, and relationships represented among members of this Church, paying particular attention to areas of significant and continuing change in recent years; and be it further

Resolved, That the President of the House of Deputies and the Presiding Bishop, appoint 15 persons to include 3 bishops, 4 priests or deacons, and 8 laypersons, with members to include a geographically diverse representation from the Church mindful to include younger generations, people of color, LGBTQ+ people, native persons, and persons with experience in a variety of household structures; and be it further

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

Resolved, That the Task Force shall recommend to the 82nd General Convention and to the Episcopal Church resources for engaging in conversation, in recognition of the recent and emerging changes in household, family and relationship structures among members of this Church, around the ways in which diverse configurations of families and households may pattern themselves in accordance with the teachings of Christ as members of the Household of God, and the ways in which churches, congregations and dioceses may support such families and households in their Christian lives.

Resolved, That this Convention request the Joint Standing Committee on Program, Budget, and Finance to consider a budget allocation of \$50,000.00 for the implementation of this resolution, with \$20,000.00 allocated for the first triennium of the task force's existence and \$30,000.00 for the second triennium.

Summary of Work

The Task Force to Study Household and Relationship Diversity has met together since February 2023. From the onset we have recognized the large task at hand and the many areas of consideration that might fall under this group’s purview—including, but not limited to:

- intergenerational households
- marriage equality
- cohabitation prior to marriage
- blended families
- relationship transitions for clergy
- diverse relationship structures
- intentional communities
- heteronormative structures within the church institution

After several meetings, we have determined it is of utmost importance for the Body of Christ to engage in a broader conversation around sexual ethics, from which the Task Force hopes to gain direction and clarity.

Since our work began, we have further subdivided ourselves into five small groups, to begin to organize and tackle these multiple areas of focus. Our small group on “Transitions and Church Employees”, is considering how we might create healthy norms for supporting church employees during major identity and relationship transitions. They have crafted questions to be compiled into a churchwide survey. Another small group is listening to stories of individuals who represent diverse relationship structures, in hopes of these stories becoming testimonials that will inform a broader sexual ethics conversation.

Our next steps include, in early 2024, crafting a second church wide survey that will gather a larger swath of information to assist the Task Force in its next steps. We recognize that we are lacking in data for many of the questions that we have asked one another. We also will gather a group of leading church theologians in sexual ethics to offer wisdom and direction for how to tackle some more controversial conversations and begin to formulate resolutions that we hope to bring before the 82nd General Convention of the Episcopal Church.

BECOMING BELOVED COMMUNITY ADVISORY GROUP

Members

The Rev. Edwin Johnson, Chair	Massachusetts, I	2024
Ms. Melissa Chapman Skinner	South Dakota, VI	2024
The Rev. Canon John Kitagawa	Arizona, VIII	2024
The Rev. Cn. Christine McCloud	Maryland, III	2024
Ms. Dianne Audrick Smith	Ohio, V	2024
The Rev. Meg Wagner	Iowa, VI	2024
The Rt. Rev. Ruth Woodliff-Stanley	South Carolina, IV	2024
Miguel Bustos, Representative of the Presiding Bishop		2024
The Rev. Isaiah "Shaneequa" Brokenleg, Staff	South Dakota, VI	2024
The Rev. Canon Stephanie Spellers, Staff	Long Island, II	2024

Mandate

2022 – Doo4 “A Resolution for Continued Funding of the Beloved Community”

Resolved, That this General Convention recognize the need to continue existing Beloved Community work in the upcoming two years alongside the work that may be underway to establish an Episcopal Coalition for Racial Equity and Justice dedicated to the long-term work of becoming the Beloved Community, as proposed in Resolution 2022-A125 by the Presiding Officers’ Working Group on Truth Telling, Reckoning, and Healing; and be it further

Resolved, That this Convention direct the continuation of the Presiding Officers’ Advisory Group for Beloved Community Implementation, with members appointed by the Presiding Bishop and President of the House of Deputies, to oversee this biennium’s Beloved Community work in coordination with Executive Council and the staff of the Episcopal Church Center and also with the new Episcopal Coalition for Racial Equity and Justice as it is established, and to report on this work to the 81st General Convention; and be it further

Resolved, That the 80th General Convention request that the Joint Standing Committee on Program, Budget and Finance allocate \$550,000 for the biennium of 2022-2024 for continuing current efforts to respond to racial injustice and grow a Beloved Community of healers, justice makers and reconcilers, and that such monies be utilized to:

- Make Beloved Community grants to agencies and dioceses and other affiliated entities of The Episcopal Church for the establishment of programmatic activities aimed at addressing the issue of racial reconciliation, such as speaker series, sacred conversations, racial reconciliation workshops, and any such activities that promote the purpose of this resolution, with \$450,000 allocated specifically for these grants;
- Plan and host Building Beloved Community conferences, with a biennium budget of \$100,000;
- Engage conversations with ethnic ministry groups, interim bodies and other church organizations to dialogue about the specific ways systemic racism influences and afflicts ability to participate in building the Beloved Community through their ministries (with the understanding that funds and staff to support virtual meetings is already embedded in the Ethnic Ministries and Racial Reconciliation budgets, and that the General Convention Office can also support virtual meetings with interim bodies);

And be it further

Resolved, That the Joint Standing Commission on Program Budget and Finance consider a budget allocation of \$550,000 for the implementation of this resolution.

Summary of Work

Fulfilling their responsibility to organize a Becoming Beloved Community conference (see Resolution D004, 3rd resolve, 2nd bullet), the advisory group partnered with Presiding Bishop's staff and other organizations to host "It's All About Love," a Jesus Movement revival and learning festival held in Baltimore July 9-11, 2023. The festival was organized around three tracks – evangelism, racial reconciliation and creation care. More than 1,300 Episcopalians took part in the festival worship, plenaries and workshops. Under the Beloved Community festival tent, participants were treated to more than 30 workshops and sessions on racial justice, reconciliation and healing, along with an inspiring plenary and a revival worship service centered on Beloved Community.

The advisory group played a critical role in recruiting and selecting dozens of workshop leaders, the reconciliation plenary speaker (noted Asian feminist theologian Kwok Pui Lan) and the revival preacher (Sarah Augustine of the Religious Coalition to Dismantle the Doctrine of Discovery). Throughout the actual event, advisory group members were front-and-center offering public leadership in worship and learning spaces. There is no doubt the festival advanced and expanded Episcopal work toward racial healing, justice and reconciliation, and placed that work in conversation with important movements around evangelism and creation care. We look forward to future opportunities to gather, learn, equip and celebrate one another's ministries in this catalytic setting.

Committed to continuing the work in local contexts the advisory group also coordinated a final round of grants to be dispersed in the Spring of 2024.

THE CONSTITUTING GROUP FOR THE EPISCOPAL COALITION ON RACIAL EQUITY AND JUSTICE

Members

Ryan Kusumoto, Co-Convener	Hawaii, VIII
The Rt. Rev. Ian T. Douglas, Co-Convener	Connecticut, I
The Very Rev. Miguelina Howell	Connecticut, I
The Rev. Edwin Johnson	Massachusetts, I
The Rev. Canon John Kitagawa	Arizona, VIII
Zena Link	Western Massachusetts, I
Thomas Little	Vermont, I
The Rt. Rev. Kimberly Lucas	Colorado, VI
Crystal Plummer	Chicago, V
The Rt. Rev. Samuel Rodman	North Carolina, IV
The Ven. Paul Sneve	South Dakota, VI
The Rev. Rachel Taber-Hamilton	Olympia, VIII
The Rev. Bryan Vélez-García	Puerto Rico, II
The Rev. Meg Wagner	Iowa, VI
Kent Anker, ex officio	New York, II
Julia Ayala Harris, ex officio	Oklahoma, VII
The Most Rev. Michael Curry, ex officio	North Carolina, IV
Michael Glass, ex officio	San Joaquin, VIII
Mary Kostel, ex officio	Washington, III

Acknowledgements

The Constituting Group for the Episcopal Coalition on Racial Equity and Justice (Constituting Group) wants to recognize the professionalism and support given by the staff of the Domestic and Foreign Ministry Society (DFMS). The assistance helped to make sure that the work progressed smoothly. The Constituting Group also appreciates the interpreters who were present at every meeting.

The Constituting Group would like to acknowledge members of the Presiding Officers' Working Group on Truth-telling, Reckoning, and Healing, the Executive Council Committee on Anti-Racism and Reconciliation (ECCARR), the Deputies of Color, and the House of Bishops for engaging in conversations that helped to shape of the work of the Constituting Group.

Mandate

Resolution 2022-A125, titled "Extending and Furthering the Beloved Community," adopted by the 80th General Convention of The Episcopal Church, outlined a comprehensive approach toward achieving racial justice and equity within the church community. The mandate emphasized The Episcopal Church's commitment to becoming the Beloved Community of Jesus, a vision central to the Church's baptismal vocation. It called upon all Episcopalians to engage in a lifelong vocation focused on racial justice, equity, and the dismantling of white supremacy.

To facilitate this vision, the 80th General Convention passed resolution A125 establishing the Episcopal Coalition for Racial Equity and Justice (Coalition). The Coalition is a voluntary association of Episcopal dioceses, parishes, organizations, and individuals, all dedicated to embodying the principles of the Beloved Community. The Coalition was and is tasked with a broad range of responsibilities, including facilitating, coordinating, and supporting efforts aimed at racial justice and the dismantling of white supremacy, in collaboration with The Episcopal Church Center's Executive Council and staff.

Resolution A125 empowered the Presiding Officers to appoint a board to take the organizational and legal steps necessary to advance the coalition. As a result, a Constituting Group (The Mandate) was appointed by the Presiding Bishop and the President of the House of Deputies. This group is responsible for the development, implementation, and oversight of the Coalition, ensuring it has the necessary organizational, canonical, and legal frameworks to operate effectively. The budget of the 80th General Convention provided \$300,000 for the work of the Constituting Group for the biennium 2022-2024.

Summary of Work

In February 2023, The Episcopal Church announced the appointments by the Presiding Officers to the Constituting Group as part of its efforts toward racial justice and reconciliation. This move followed the 2022 Presiding Officers' Working Group on Truth-Telling, Reckoning, and Healing's recommendation, which led to the adoption of Resolution A125 at the 80th General Convention. This resolution calls for Episcopalians to work actively against racial injustice and white supremacy, aligning with their baptismal vow.

The Constituting Group was tasked to develop the structure for the newly formed Episcopal Coalition for Racial Equity and Justice. The Coalition aims to unite dioceses, groups, parishes, and individuals in this cause. Per Resolution A125, funding for the Coalition, in part, is provided from the income of 10% of the The Episcopal Church's unrestricted trusts and endowment funds available for general use.

Feedback from multiple listening sessions with the wider Church and constituents shaped The Constituting Group's focus. The Constituting Group held the following conversations with constituents:

- Presiding Officers' Working Group on Truth-Telling, Reckoning, and Healing (June 3, 2023)
- Deputies of Color (June 17, 2023)
- It's All About Love (July 10, 2023)
- Executive Council Committee on Anti-Racism – ECCAR (October 28, 2023)
- House of Bishops (February 28, 2024)

During those discussions, several key themes emerged:

First, there is a consensus that a "Lighter is Better" approach, focusing more on mission and less on structures, will foster the Coalition's growth and vitality. The Coalition should also uphold accountability and collaboration with the larger church community and staff of The Episcopal Church Center, serving both as a partner and a moral compass, particularly in support of marginalized groups.

Second, it is essential for interested individuals to engage with the Coalition as participants rather than as traditional subscribing members. Participation is voluntary and inclusive, and not bound by annual financial fees or contributions. This reflects a broader, more inclusive understanding of community beyond more traditional understandings of organizational membership identity and ensures that anyone can contribute, from individuals to dioceses to other groups. Language matters here, and the Coalition, as a network, will stress the role of "participants" rather than "members" in its bylaws and incorporating documents.

Transparency is another crucial factor. There's a unanimous desire for open communication with stakeholders, utilizing tools such as this Blue Book Report and other consistent communication methods, underlining the principle that more transparency leads to better relationships and deeper trust.

Regarding fundraising, beyond the resources provided from the endowment income of The Episcopal Church there is a desire to work toward a model that allows all to contribute meaningfully, fostering a sense of ownership and equality among participants.

Finally, the structure of governance was discussed, suggesting the establishment of an initial board followed by an ongoing one, with staggered terms and some members appointed by the Presiding Officers, ensuring continuity and fresh perspectives. All agreed that a supermajority of the Coalition's Board would be individuals from historically marginalized and underrepresented communities in The Episcopal Church.

The Constituting Group has met approximately monthly via zoom beginning in April 2023. An in-person meeting was held at The Episcopal Church Center from October 31 – November 2, 2023. The work of the Constituting Group was divided among three subcommittees: Structure and Governance, Communications, and Kick-off/Inaugural Event, each focusing on different aspects of the Coalition's ongoing formation and outreach.

Structure and Governance Subcommittee: The Structure and Governance Subcommittee reviewed the conversations from the listening sessions and set about establishing the legal framework for the Coalition to move forward. Excellent contributions from the Chancellors for the Presiding Bishop and the President of the House of Deputies, and the Chief Legal Officer of The Episcopal Church, with assistance from outside legal counsel specializing in not-for-profit law, led to a draft Certificate of Incorporation, and Bylaws for the Episcopal Coalition for Racial Equity and Justice.

Communications Subcommittee: The Communications Subcommittee developed a communication strategy for the initial and ongoing efforts of the Coalition. They also took on the task of writing press releases and organizing discussions with Executive Council, in addition to providing updates to the Episcopal News Service. Furthermore, they set up a website (www.episcopalcoalition.org), Facebook (<https://www.facebook.com/episcopalcoalition/about>) and Instagram (<https://www.instagram.com/episcopalcoalition/?igsh=MW1yeml3N2phNXE4Yw%3D%3D>) accounts, and an email address dedicated to the coalition's activities.

Kick-off/Inaugural Event Subcommittee: The Kick-off Subcommittee brainstormed the best ways to successfully launch the Episcopal Coalition. After considering several ideas and discussing the timing, they decided to plan a significant event for early 2025, avoiding an additional church-wide meeting in 2024 when there is a General Convention and the seating of a new Presiding Bishop.

Following thorough discussion and evaluation, in February 2024 (?) the Constituting Group adopted the draft Certificate of Incorporation, and Bylaws for the Episcopal Coalition for Racial Equity and Justice providing official legal status for the Coalition. The Bylaws detail the organizational structure, purpose, and procedural rules of the Episcopal Coalition for Racial Equity and Justice. This is to ensure that the coalition operates in accordance with both legal standards and church guidelines. The legal documents were signed by Presiding Bishop Curry and President of the House of Deputies Ayala Harris on April 17, 2024 thus incorporating the Coalition as a nonprofit corporation. See “Supplemental Materials” below. The nonprofit corporation, legally based in New York City, adheres to the laws of New York State. It will have a Board of Directors consisting of up to 17 members, with at least 70% coming from historically marginalized and underrepresented communities in The Episcopal Church. The initial Board will be made up of members from the Constituting Group, plus an additional four members chosen by Presiding Officers, with each Officer appointing two additional members. Board Directors are assigned staggered terms of two years, subject to term limits.

Additionally, the Constituting Group has recommended an addition to the Canons of The Episcopal Church that would further clarify the funding for the Coalition provided by income from 10% of the The Episcopal Church's unrestricted trusts and endowment funds available for general use. This proposed canonical addition will be jointly submitted to the 81st General Convention by the Presiding Bishop and the President of the House of Deputies.

The Constituting Group thanks God and all involved in the development of the Episcopal Coalition for Racial Equity and Justice for creating this new and imaginative way to help all Episcopalians extend and further our commitment to become the Beloved Community. We have felt the leading of the Holy Spirit in all our work together and we are bolstered by this fresh wind blowing through our church.

Supplementary Materials

The Presiding Officers' Working Group on Truth-Telling, Reckoning, and Healing Blue Book Report:
<https://extranet.generalconvention.org/staff/files/download/31499>

***Article of Incorporation

***Bylaws

REPORT FOR THE PRESIDING BISHOP'S STAFF

As Chief Pastor and Primate of the Church, the Presiding Bishop is charged with “responsibility for leadership in initiating and developing the policy and strategy in the Church and speaking for the Church as to the policies, strategies and programs authorized by the General Convention” (Canon I.2.4.a.1). Presiding Bishop Michael Curry continues to fulfill this charge through a collaborative approach. He serves as chair of the **Executive Council** of The Episcopal Church, as well as that body’s **Executive Committee (ECEC)**, which meets as needed.

As president of the **Domestic & Foreign Missionary Society**, he confers regularly with the other Officers of the DFMS:

Ms. Julia Ayala-Harris, President of the House of Deputies;
The Rev. Cn. Michael Barlowe, Secretary and Executive Officer of General Convention;
Mr. Kurt Barnes, Treasurer and Chief Financial Officer;
Ms. Jane E. Cislucyis, Acting Chief Operating Officer;
Mr. Kent Anker, Chief Legal Officer;

as well as his three Canons:

The Rev. Cn. C.K. Robertson, Ph.D., Canon for Ministry Beyond The Episcopal Church;
The Rev. Cn. Stephanie Spellers, Canon for Evangelism, Reconciliation, & Creation Care;
The Rt. Rev. W. Michie Klusmeyer, Canon for Ministry Within (until Nov. 1, 2023).

Together, these Officers and Canons constitute the **Executive Leadership Team (ELT)**.

The Presiding Bishop likewise meets regularly with his **Chiefs & Canons**, who report directly to him and oversee much of the programmatic work of the DFMS. This group includes the Canons, the Acting COO, the CFO, and the CLO, as well as:

Ms. Mary Kostel, Chancellor to the Presiding Bishop;
The Rt. Rev. Todd Ousley, Bishop for Pastoral Development.

He also confers respectively with those bishops who provide oversight on his behalf for ministries that come under the jurisdictional authority of the Presiding Bishop:

The Rt. Rev. Ann Ritonia, Bishop Suffragan for the Armed Forces & Federal Ministries;
The Rt. Rev. Mark D.W. Eddington, Bishop in Charge of the Convocation of Episcopal Churches in Europe;
The Rt. Rev. Robert L. Fitzpatrick, Bishop Diocesan of Hawai’i, who provides oversight for the Episcopal Church in Micronesia.

Bishop Curry is supported in his work by Sharon Jones, Deputy for Administration and Logistics for the Presiding Bishop and Primate.

Within the DFMS, the staff of the Presiding Bishop are organized under several areas, each overseen by its respective Chief, Canon, or Bishop. The following report lists those areas and their corresponding departments, highlighting key accomplishments or efforts in this triennium.

MINISTRY BEYOND THE EPISCOPAL CHURCH

This unit, often referred to as **Team Beyond** focuses on the relational and programmatic work that connects us with others outside our dioceses and congregations. Our goal is: “building bridges beyond ourselves.” The Canon, Directors, and team members maintain ongoing direct contact with the Anglican Communion Office, Lambeth Palace, the Anglican Alliance, governmental offices, religious partners, and other agencies, as well as working closely with Episcopal Relief & Development and the Office of Armed Forces & Federal Ministries.

Four departments comprise Team Beyond:

ECUMENICAL & INTERRELIGIOUS RELATIONS

With its director, the Rev. Margaret Rose, this office supports official dialogues with:

- [United Methodist Church](#);
- [Presbyterian Church](#) USA;
- [Roman Catholic Church](#);

and coordinating committees with full communion partners:

- [Evangelical Lutheran Church in America](#) (ELCA);
- [Moravian Church](#).

The EIR office continues to hold active roles in ecumenical bodies:

- [National Council of Churches](#) (NCC);

- [Christian Churches Together](#) (CCT);
- [World Council of Churches](#) (WCC).

Churches Beyond Borders is a full-communion working coalition in ministry and advocacy between [The Episcopal Church](#), the [Anglican Church of Canada](#), the [Evangelical Lutheran Church in Canada](#), and the [Evangelical Lutheran Church in America](#).

The Episcopal Church and the Church of Sweden [signed a final memorandum of understanding](#), celebrating full communion in 2022/2023.

The EIR office is active in the NCC interfaith dialogues: Sikh, Buddhist, Jewish, Muslim, Hindu, and also with organizations:

- [Religions for Peace](#);
- [Shoulder to Shoulder](#);
- [National Religious Partnership for the Environment](#);
- and in advocacy work, including initiatives against anti-Muslim and anti-Jewish bias.

The Standing Commission on Ecumenical and Interreligious Relations will present new statements and [guidelines on Interreligious Relations, Christian-Jewish Relations, and Christian-Muslim Relations](#). We also work closely with the other Team Beyond offices in work at the United Nations and with groups such as Churches for Middle East Peace.

During the last triennium, much work has focused on our Church's public witness on racial justice—including the ecumenical [“Past Reckoning” webinars](#)—through deeper collaboration with ecumenical and interfaith partners, in coalitions such as [Christians Against Christian Nationalism](#), Shoulder to Shoulder, the National Council of Churches' [ACT now to End Racism](#), Religions for Peace's work on Immigration and Refugees, and the UN's engagement in human rights and the [UNCSW](#). The EIR office serves as a resource for the Episcopal Church staff projects and dioceses as needs arise.

A [regular newsletter](#) (sign up [here](#)) shares this work and the website offers [one pager resources](#) for the dialogues and interreligious work.

EPISCOPAL MIGRATION MINISTRIES

With its director, Sarah Shipman, this department includes both a Refugee Resettlement Agency and an Engagement and Communications Unit.

EMM's government-funded resettlement program ([Refugee Resettlement Ministry | Episcopal Migration Ministries](#)), administered by EMM program staff, and carried out by local affiliates and volunteers, assisted almost 14,000 refugees, parolees, special immigrant visa holders and other migrants with a safe and hopeful beginning in the U.S.

EMM's Engagement and Communications Unit convened the Episcopal Asylum and Detention Ministry Network <https://episcopalmigrationministries.org/ministrynetwork/> throughout the triennium. The Network focuses on best practice-sharing in areas of direct service, organizing, advocacy actions, Christian formation and worship resources, and community education to protect asylum, promote humane and dignified alternatives to detention, and to support asylum seekers and those harmed by the immigration detention system.

In partnership with members of the Ministry Network, in 2022, EMM produced *Las Posadas: A Churchwide Christmas Pageant* <https://episcopalmigrationministries.org/lasposadas/>.

A major focus for EMM during the triennium was the Rainbow Initiative <https://episcopalmigrationministries.org/rainbowinitiative/>, created in response to General Convention 2022 Resolution D045: [D045 "On Supporting LGBTIQ+ Refugees and Asylum Seekers"](#).

In addition, EMM hosted bimonthly programmatic update calls to Episcopalians and diocesan representatives throughout 2022 and 2023, providing information and answering questions related to EMM's work, changing U.S. humanitarian immigration policy and practice, and ways for dioceses and congregations to be involved in migration ministry.

GLOBAL PARTNERSHIPS & MISSION PERSONNEL

With its director, the Rev. David Copley, this office seeks to "*Partner with God's world to share the love of Jesus,*" develop a churchwide network of Global Mission Advocates to support global mission engagement across TEC dioceses. The office hosts a monthly networking call to offer timely topical reports and bring people together to share their global ministry experiences.

The [Partnership Officers](#), whose respective areas are Africa, Asia & the Pacific, Latin America & the Caribbean, and the Middle East, have focused on networking, shared learning, and leadership development with a particular focus on theological education. As one example, in Tanzania, mission volunteers based at St. Philips Theological College in Kongwa have developed a program working with seminarians and communities to support the full inclusion of people who are differently abled. This has been shared with multiple provinces in East Africa.

Mission Personnel continues to rebuild the [Episcopal Volunteers in Mission](#) (EVIM) and the [Young Adult Service Corps](#) (YASC) programs following the COVID pandemic. During the time of the lockdown, we found creative ways to support work being done by dioceses along the U.S.-Mexico

border. In July 2024, we will host a young adult pilgrimage focusing on migration in partnership with dioceses in Central America as well as the U.S.-Mexico border dioceses.

On behalf of the Presiding Bishop, [the Episcopal UN office](#) represents and advocates at the United Nations on priorities as guided by General Convention. The office empowers Episcopalians in their UN engagement and collaborates closely with the Anglican Communion UN office and other faith-based UN partners on mutual priorities.

In 2022, Global Partnerships had a team present at the Lambeth Conference, supporting the work of our bishops during that gathering in Canterbury, England. The department will also host Primates, Provincial Secretaries, and other Communion guests at the General Convention in 2024, to help educate our partners about who we are and how we make decisions, thereby furthering the vision and commitment of our Church in the worldwide Communion.

OFFICE OF GOVERNMENT RELATIONS

With its director, Rebecca Linder Blachly, this office, established in 1979, seeks to provide one essential way for the Church to carry out our mission, through the ministry of public policy advocacy. The Office of Government Relations (OGR) represents the public policy priorities of The Episcopal Church, as laid out by General Convention and Executive Council resolutions, to the U.S. government in Washington.

General Convention and Executive Council have directed **OGR to take action on [more than 600 resolutions focused on public policy advocacy](#)**. OGR works in secular and faith-based coalitions to take action on these resolutions including through sending action alerts, public statements, sign-on letters, private meetings with Congressional offices and U.S. government officials, and through education and advocacy with the [Episcopal Public Policy Network](#).

Each year, Episcopalians **send nearly 80,000 messages to Congress** through the Episcopal Public Policy Network, which is run and managed by the Office of Government Relations. **More than 10,000 Episcopalians have taken action** through the EPPN.

OGR also hosts [“Network Calls,”](#) where an average of 70 Episcopalians tune in each week. OGR staff provide updates on legislation, share information about initiatives and policies of the Administration, and answer public policy questions. These calls are open to call Episcopal Public Policy Network members. OGR also host a monthly Network at Night call to call more Episcopalians to join, allowing our office to be a resource for leaders throughout the Church to learn more about the ministry of public policy advocacy.

OGR highlights issues such as [gun violence prevention](#), [racial reconciliation](#), [reproductive rights](#), [Indigenous rights](#), [environmental justice and climate change](#), [human rights and peacebuilding](#), and [anti-poverty](#) programs through our action alerts, behind-the-scenes advocacy, and coalition work.

OGR supports policies and legislation addressing [global AIDS relief](#), [rights for LGBTQIA2S+ people](#), [support for refugees and asylum seekers](#), and **paid family leave**, and ending the threat of nuclear weapons. OGR takes action on all the public policy focused resolutions of General Convention and Executive Council.

MINISTRY WITHIN THE EPISCOPAL CHURCH

This unit oversees work done in direct connection with dioceses and congregations of The Episcopal Church. The Canon for Ministry Within is supported by Ednice Baerga, Executive Assistant to the Canon for Ministry Within The Episcopal Church. Together, they work closely with Bishops and Dioceses throughout the Church to coordinate events which the Presiding Bishop will attend, including:

- bishop consecrations;
- official visitations;
- diocesan conventions;
- clergy conferences;
- and special dedications or anniversaries.

They also:

- share resources and information through the **House of Bishops** listserv and help build relationships across the Church.
- coordinate both in-person and online gatherings of the House of Bishops, both official meetings and unofficial conversations, as well as the **HOB Planning Committee**, the **Presiding Bishop's Council of Advice**, and various committees of the House of Bishops. They sometimes do this in collaboration with the **General Convention Office**.
- partner with the **Office of the President of the House of Deputies** and the General Convention Office to appoint members of the Interim Bodies of General Convention, including Standing Commissions and Task Forces, and help provide counsel and resources for these groups.

There are two departments that are part of this Ministry Within unit:

FAITH FORMATION

The Department of Faith Formation oversees formation and ministry of all ages with a primary focus on youth (ages 13-18), young adults (ages 18-30), and leaders.

We incorporate the work of four different offices:

- **Youth;**
- **Young Adult and Campus;**
- **Safe Church, Safe Communities;** and
- **Episcopal Service Corps.**

We equip and support those working with children and adults through our ongoing ministry of Lesson Plans that Work, bible studies, and leadership development.

In 2023, the Department of Faith Formation was awarded a \$1.25 million, five-year Lilly Foundation grant for *The Camino Project: Faith-Forward Pathways for Episcopal Families*.

- We received a \$100,000 from Trinity Wall Street for research and resources for Generation Z titled *Toward a New Generation of Episcopal Leaders*.
- We seek to train, teach, and mentor leaders by convening, coordinating, and facilitating gatherings of leaders and young people for development, networking discernment, and mutual support.
- We build and sustain relationships within networks of leaders and possible partners, striving to advocate and maintain the visibility and importance of children, youth, and young adults.
- We work with partners to curate and create resources that help form disciples of all ages.
- We organized all aspects of several events, such as [Episcopal Youth Event](#) and the annual [Young Adult & Campus Ministries Leadership conference](#).
- We facilitated all aspects of nationwide recruitment, outreach, application, and network coordination for [Episcopal Service Corps](#).
- And we coordinated, collaborated with, and provided counsel to the Standing Commission on Formation and Ministry Development as they worked on resolutions from General Convention.

TRANSITION MINISTRIES

The Office for Transition Ministry (OTM) supports bishops, diocesan transition ministers, clergy, lay leaders, seminaries, and other groups in search and call processes across the church. The office is staffed by 2 people. (Bishops searches are handled through the Office of Pastoral Development.)

OTM also assists in the orientation and training of most new diocesan transition ministers and serves as a resource for self-organized regional groups. OTM interfaces with the Anglican Communion as well as ecumenical partners on matters of shared ministries. OTM also assists with the planning and implementation of transition minister meetings approximately every three years.

Recently, the office has partnered closely with the Research Department of Church Pension Group and the General Convention Office to analyze and share data regarding parish and clergy trends across the church and across time, providing relevant information to key decision makers including Executive Council, the House of Bishops, seminary deans, and churchwide.

EVANGELISM, RECONCILIATION, AND CREATION CARE

This unit spans the areas of Evangelism and Discipleship, Church Planting and Redevelopment, Ethnic Ministries, Racial Justice, Creation Care, Domestic Poverty, Social Justice and the United Thank Offering. Together, we hope to ensure the Episcopal branch of the Jesus Movement keeps becoming a church that looks, lives and loves like Jesus.

ETHNIC MINISTRIES

We continued to provide resources, training and leadership development for laity and clergy to strengthen existing ethnic congregations while assisting the church to more fully embrace the multiethnic, multilingual, and multicultural societies we live in.

Working with our Councils of Advice and working teams, as well as partners across the church, we have focused much of our programming and events [both virtual and in person] around formation in different capacities:

[Asiamerica Ministries](#) was impacted by the departure in 2022 of the Rev. Winifred Vergara, who served 19 years as Missioner for Episcopal Asiamerica Ministries. The interim missioner, the Rev. Pamela Tang, continued convening each of the unique cultural convocations in the ministry. The office is developing a Younger Adult group for Asian Episcopal leaders. Additionally, an Asian Clergy Conference and a Women Asian Clergy Conference was underway at the close of 2023, with participants from across the country.

[African Descent Ministries](#) launched the Internalized Oppression retreats to address healing needs of people of African descent, and they are developing a broader curriculum to incorporate additional ethnic communities. Programs such as Black Congregational Leadership Initiative and CPR (Congregational Program for Revitalization) provide much needed congregational support. The office also offered a timely resource for developing effective virtual ministry.

[Indigenous Ministries](#) made major inroads in dioceses across the church, as Episcopalians sought Doctrine of Discovery training and presentations on Indigenous Residential Schools as mandated by General Convention. The team also supported the work of the Indigenous Boarding School Commission called forth by Resolution A127 at GC80. A successful partnership with Bexley-Seabury has made greater Theological Education and Leadership Development available to Indigenous Episcopalians. The Office also resumed Winter Talk in-person, bringing together leaders from across indigenous ministries.

[Latino/Hispanic Ministries](#) continued to focus on the formation of leaders and church planters, lay and clergy, both Latino and Anglo. The Episcopal Latino Ministry Competency (ELMC) course and a virtual version (VELMC) together provided cultural training to more than 400 seminarians, clergy, lay leaders and bishops. With support from IONA Collaborative and Trinity Church Wall Street, with a team from Latin America, we developed a three-year virtual theological formation program called Comunidad Teológica Episcopal (Episcopal Theological Community) to serve the United States, Province IX, and the Anglican Communion in Latin America.

In addition to individual office efforts, the Department of Ethnic Ministries works collaboratively and holds several events to support our joint ministries. These include Why Serve, a vocational discernment conference for young adults of color, and the Seminarians of Color conference, which encourages building a network of colleagues across ethnicities.

EVANGELISM & DISCIPLESHIP

The Evangelism Team seeks to inspire and equip Episcopalians to seek, name and celebrate Jesus's loving presence in their own and other's stories, and to invite everyone to deeper relationship with God, via the following:

- [It's All About Love: A Festival for the Jesus Movement](#). This churchwide festival of worship, learning, community, and action for the Episcopal branch of the Jesus Movement was held July 9-12, 2023 at the Baltimore Convention Center. More than 1,100 people attended in person and countless more joined online. The festival ignited hearts and connected passionate leaders and learners at the intersection of evangelism, reconciliation and creation care. Monthly webinars feature fresh presentations by some of the most popular speakers at the festival.

- Monthly Evangelism Huddles that connect and inspire episcopal evangelism catalysts with evangelism mentors from around the church.
- Diocesan [Revivals](#) that included pre-planning discernment retreats and a new post-revival follow-up resource entitled https://www.episcopalchurch.org/evangelisminitiatives/living-revival/Living_Revival.

Discipleship in The Episcopal Church is centered on helping people become deeply rooted in love with God and one another in order that all may grow to look, act, and love more like Jesus. To that end, the work we focused on was:

- [Centered: A Christian Discipleship Resource](#). This free experience includes an initial three-session training for group facilitators, nine core sessions during which church members, neighbors, and friends gather to share a meal and grateful prayer, and then view two short films and discuss questions about God, belonging, and living a meaningful life. Monthly support and coaching are available for small group leaders. Centered and all supporting programs have been made possible by a UTO grant and the Sharing the Way of Love campaign.
- Through a partnership with *Renewal Works* we launched [My Way of Love](#), a personal guide for the spiritual journey. This resource includes personal coaching, a small group guide, and tips for dioceses and parishes to employ this resource in their unique contexts.
- Production on the “[Traveling the Way of Love](#)” video series and “[The Way of Love Podcast with Bishop Michael Curry](#)” also continued, and My Way of Love for Kids will launch summer of 2024.

CHURCH PLANTING & REDEVELOPMENT

Our team offers game-changing resources and relationships to Episcopalians yearning to either launch new ministries or to revive existing churches for the sake of love for our neighbors. Church Planting – or [New Episcopal Communities](#) (or NEC) – offered grant funding, leadership discernment, training, and coaching resources for those exploring the idea of starting a new venture. Meanwhile, the Redevelopment wing – or [Genesis II: Re-Vision and Renew](#) – invited churches of all sizes to courageously explore new ways to “be” church in their community. Together with the Advisory Group on Church Planting and Redevelopment, we made these strides in the biennium:

- Launched the online Activator Course to assist with training of New Episcopal Community leaders.
- Published a Guide to New Episcopal Communities for diocesan leaders

- Worked with advisory group to review proposals and administer about \$1.5 million in New Episcopal Community grants, especially prioritizing under-represented groups in The Episcopal Church.
- Organized and hosted annual Genesis gatherings (for both New Episcopal Community leaders and Redevelopment leaders). The 2023 gathering – held at Saint Mary's in Los Angeles – was the most diverse and well-attended Genesis Gathering ever.
- Hosted three leadership assessment retreats for potential New Episcopal Community leaders as well as retreats for redevelopers.
- Launched a monthly online Ministry Incubator on 3rd Thursdays at 3 during which visionaries present their ideas to a discerning group of seasoned leaders in a process of mutual discernment known as pro-Action Café.
- Expanded our monthly offerings for New Episcopal Community and Redevelopment leaders in our monthly 2nd Tuesdays at 2 gatherings.
- Consulted and coached more than 75 diocesan leadership teams around the “Practicing Possibilities” church-wide learnings.
- Continued to develop extensive resources around the “Two Loops Model of Living Systems,” a compassionate look at the life cycles of faith communities.
- Companioned four dioceses through the Genesis2 “Pilgrimage in Transformation” 18-month process with additional dioceses preparing to join these, before General Convention 2024.

RECONCILIATION, JUSTICE & CREATION CARE (RJCC)

The Department of Reconciliation, Justice and Creation Care takes an intersectional approach to justice across the fields of race, creation care, domestic poverty. Throughout this biennium, we worked to challenge, equip, inspire, and empower the Church to create and become the Beloved Community and live in right relationship with all of God’s creation.

Racial Justice and Reconciliation: Our team continued to support and inspire Episcopalians for Becoming Beloved Community: the church’s long-term commitment to dismantle White supremacy and follow Jesus’s way of justice and love. In particular, we did the following:

- Major leaders and organizers for the [It’s All About Love Festival](#). Among other things, the gathering functioned as the church’s first Becoming Beloved Community Summit, with keynote speakers, transformative worship and a racial reconciliation track that included more than 30 workshops and speakers.

- The [Prophetic Voices Podcast](#) prepares Episcopalians to preach and teach courageously using a racial justice and antiracism framework. The podcast is one of the most popular produced by the Church.
- [Sacred Ground](#) created a robust space for Episcopalians of all races to reflect deeply on White supremacy and systemic racism in the United States. Since its launch in 2019, we have engaged at least 90 dioceses, 2,700 Circles, and 30,000 alums across the Church. More recently, we have worked to effectively equip alums to engage in justice, action and transformative relationship in their communities.
- The annual [Inventory of Racial Justice and Reconciliation Ministries](#) – sourced by a detailed survey available to all Episcopal dioceses – provides detailed info on how dioceses are addressing racism and helps groups to network and support one another for the movement.
- We continued to nurture the Church’s crucial partnership with the [Absalom Jones Center for Racial Healing](#) in the Diocese of Atlanta.

Care of Creation: The team advances [Creation Care](#) by drawing on diverse approaches for our diverse contexts, and equipping and inspiring Episcopalians to commit to form and restore loving, liberating, life-giving relationships with all of Creation. We did this in several ways:

- Curriculum and Formation Tools: In addition to providing a hub for faith-based and Episcopal Creation Care and Environmental Racism tools and resources, we developed and launched "[Love God, Love God's World](#)," a new film-based, small group curriculum.
- Grants and Creation Care Network: In partnership with the Task Force on Creation Care and Environmental Racism, we funded and spotlighted local innovations in creation care in every province, and we grew the network of ministry leaders who encourage and challenge one another to greater climate ambition.
- [Episcopal Renewable Energy Nonprofit](#): Partnered on the creation of a new Episcopal nonprofit that assists churches and dioceses with environmental adaptation.
- Eco-Justice Fellows: Built vibrant young adult program that provides training, mentoring and resources leaders focused on environmental racism
- Local and International Advocacy: Consulted with diocesan and regional leaders fighting environmental injustice and equipped local leaders to champion change in environmental laws. Represented the Presiding Bishop in various Anglican Communion and United Nations convenings on environment and climate, and trained Episcopalians to be effective advocates at home and abroad. [Click this link](#) to view a

video about the Episcopal delegation to the UN's 26th Conference of Parties on Climate Change (COP26).

Domestic Poverty, Social Justice and Engagement: The department also supports the Church's work around economic and social justice, including leading the hiring of a new Staff Officer for Gender Justice, in response to [GC80 resolution Ao63](#), which called for a staff person to address women's and LGBTQIA+ ministries:

- [Poor People's Campaign leadership](#), supporting Episcopalians engaged in the ecumenical struggle for economic justice, providing movement strategy and infrastructure for justice leaders
- Trainings on community organizing and Asset Based Community Development for dioceses, parish, and regional staff
- Jubilee Ministry funding, paired with teaching about equity-based approaches to community projects
- Episcopal Justice Assemblies and Bible training
- From the Pew to the Public Square resource and webinars
- Protest Chaplains resource and webinars to equip Episcopalians for faithful witness at public demonstrations

OPERATIONS

These areas come under the purview of the Chief Operating Officer. In December of 2022 Geof Smith retired as COO, and in February of 2023 Jane Cislucyis was appointed to fill the role.

FACILITIES & REAL ESTATE

The Church Center at 815 2nd Avenue has been the headquarters for The Episcopal Church since 1961, the year in which it was built. DFMS operations and departments occupy several floors, in addition to affiliated Episcopal Church entities, like Episcopal Relief & Development and the National Association of Episcopal Schools. Other not-for-profit and for-profit tenants use the balance of the space. It is expected the entire building (approximately 127k square feet) will be fully occupied by mid to late 2024.

Rental income generated for 2023 was \$2.5 million, which offsets \$2.7 million in utility and facility management costs. Capital improvements to the building are estimated to cost an additional \$500K

per year. As we look towards the coming triennium, Church Center building repairs and capital improvements—to the façade, sidewalk and sub-basement—will be required, estimated to cost about \$1.5 million.

The 5th floor conference room, which was installed in 2020, has seen a lot of use this past year as more departments and ministries are meeting together again. The space has accommodated numerous gatherings hosted by affiliated groups meeting at the United Nations.

Office facilities are also leased by the DFMS in Washington, DC and Austin, TX. Their needs as tenants are met through support from our operations and facilities staff as required.

HUMAN RESOURCES

Department leadership changed in 2023 with the retirement of director Raphaele Sondak. After a prolonged process, and with the support of a search firm and an ad hoc advisory committee comprised of staff and an Executive Council member, Michael Walsh was selected as the new department head. Mr. Walsh is a well-respected HR professional who has worked on the benefits side of HR for the DFMS for over two decades. He has begun listening sessions about staff needs and input to inform his building out of the department in the coming year.

The all staff in-house was held at the Maritime Institute outside of Baltimore in September 2023. This was the first time that such an in-person gathering had taken place since 2019. It was the first time that many staff hired during the pandemic had ever had the opportunity to meet face to face. The event was designed to allow employees and departments to meet together and across department over several days. Feedback told us that being away from New York City was a welcome change. The next in-house will be after the election of a new Presiding Bishop.

With the lifting of pandemic restrictions in early 2023 Church Center staff began returning to office life. Having learned to work in many ways through the pandemic period, the DFMS has more formally incorporated hybrid and remote work as a complement to our traditional in-person work arrangements. At the end of 2023 employees signed new hybrid and remote work agreements, thereby committing to the same expectations and working standards regardless of their work location.

INFORMATION TECHNOLOGY

IT Director Darvin Darling has been hosting all staff meetings to inform and train in areas of Microsoft Office 365 and Teams, with an aim to get 100% participation. There is a continual review by IT of systems and products used by staff to ensure security of operations. That said, our IT team takes very

seriously its work in protecting the DFMS through strong cyber security practices in an ever riskier digital workplace.

IT, Archives, and Legal have been meeting to review the Data Retention policy and retention schedule. It appears a good time to review and renew this important practice which assures the retention of important denominational and corporate data, and addresses matters of data security as well. In addition, IT has worked with the Church Archives staff to more fully integrate the Archives into the DFMS systems.

COMMUNICATIONS

The Episcopal News Service (ENS) serves both a core Episcopal audience, and increasingly serves as a source of accurate information cited by religious and secular media. They report on the life of the church, dioceses congregations, General Convention, Executive Council, and the Anglican Communion and beyond, following stringent journalistic standards.

The Episcopal News Service has grown its website audience in 2021-23 to over 1.2 million (which is down somewhat from the height of the lockdown), and now has over 29,000 daily news email subscribers, continues a strong following on Facebook.

The Office of Public Affairs works to consult and implement a communications strategy, acting as a trusted advisor to the Presiding Bishop and Church staff. The Public Affairs Officer acts as a liaison between secular and religious media outlets, assuring access to requested information is appropriate and transparent.

The Communications Department includes Creative Services supporting the work of the DFMS and the wider church through graphic design, film and audio production and web development. Project Management oversees the planning and execution of department newsletters, social media posts, videos, seasonal all parish mailings, Sermons That Work (in English and Spanish), podcasts, and special projects like the series *Traveling the Way of Love*. In 2023 the team additionally supported the Episcopal Youth Event, and the It's All About Love Festival.

Lastly, Language Services makes possible translations of materials produced by the departments of DFMS and works in conjunction with the General Convention Office to provide language interpretation for the Interim Bodies of the church.

FINANCE AND DEVELOPMENT

TREASURY

- Virtually all payment transactions done without paper checks.
- Regularly assisted parishes seeking confirmation of tax-exempt status.
- Provided banking transactions for Episcopal Relief & Development, ECW, UTO.
- Created and monitored the General Convention triennial budget.

CONTROLLER

- Clean audits of financials in each year.
- Virtually paperless operations.
- Provided accounting transactions for Episcopal Relief & Development, ECW, UTO.

INVESTMENTS

- Increased number of parishes and dioceses co-investing in the trust funds.
- Continued top-tier performance of the trust funds with annual long-term performance of nearly 8% after all fees and expenses.

DEVELOPMENT

- Bless Appeal exceeded goals each year.
- Increased mailing list from 80,000 names to nearly 200,000.
- Expanded repeat giving.
- Successfully completed campaigns for Cuba clergy pensions & Sharing the Way of Love.
- Ongoing campaigns to support Episcopal Migration Ministries; Historically Black Colleges; Good Friday Offering.

ARMED FORCES & FEDERAL MINISTRIES

Administration of Chaplaincies

Provide administrative support and pathways of discernment to priesthood and chaplaincy for candidates, postulants, seminarians, priests, and Armed Forces non-episcopal chaplains discerning calls to the Episcopal Church as they apply for chaplain positions within the Department of Defense Institutions and Federal agencies.

Administrative support for current chaplains to keep professional credentials current, record sacramental actions and to assist in times of ministry transition, such as deployment, retirement or return to parish ministry or retirement.

Disaster Preparedness – Episcopal Federal Chaplain Support: Distribute to all Episcopal dioceses the names of Episcopal Federal Chaplains (i.e. Active duty, Reserves, National Guard, Coast Guard Auxiliary, Civil Air Patrol, Federal Prisons, Veterans Affairs, et.al.) who are assigned and serving within the boundaries of each diocese. The list will be updated annually.

We currently have 75 active chaplains on our roster, as well as 10 military chaplain candidates and there are 9 individuals at various stages in the application process who are seeking endorsement for Federal Chaplaincy by the Bishop. In 2023 we have interviewed 17 individuals and endorsed 15. We have 4 military chaplains from other denominations currently in the formation process with our formation partner, the Diocese of the Rio Grande. 2 of our active chaplains were ordained and endorsed in the Episcopal Church this year following formation in the Diocese of the Rio Grande. 3 chaplains have moved from reserve duty to active status. One Chaplain retired in 2023 to parish ministry and is serving as a military missionary. The church currently has a military missionary in 4 Dioceses.

Pastoral Support of Chaplains

Much like parish visits, episcopal visits to chaplains in their duty stations provide opportunities for wide spiritual and pastoral care, confirmation and reception of military members, as well as guidance and encouragement to chaplains in their careers and ministry. The Bishop also gains insights on current issues and trends in DoD and Federal facilities as well as challenges and opportunities for chaplains and the wider church. Regular Episcopal pastoral letters and sermons are sent out to chaplains and partners in ministry.

The Office of AFFM was without a Bishop during 2021 and 2022 and half of 2023. The new Bishop was elected in March, started work as Bishop-elect and endorser, and was consecrated on September 30th. Prior to the onboarding of the Bishop, Canon Steffenson attended graduations and represented AFFM at endorser conferences and was the acting endorser for 2022/2023. Chaplain selection and

visitations were done remotely and by phone. 100% of our chaplains were contacted by telephone or email and 67 of our chaplains attended in-person annual training in 2023. In 2023 the new Bishop instituted monthly zoom calls with chaplains.

Training and Professional Development

Materials will continue to be developed or identified for the ongoing formation of all Armed Forces and Federal Ministries chaplains for meeting the pastoral needs of current members of the Armed Services and veterans and the incarcerated, including those coping with moral injury and other forms of combat or violence related trauma.

Annual Training Symposium occurred in March , 2023 at Kanuga retreat and Conference Center. Chaplains gathered for training and collegial opportunities. Twice annual mandatory ministry reports from chaplains kept our office apprised and in touch.

There was participation in national events, such as Memorial Day, Veterans Day, military celebrations, and state funerals.

Clergy participated in recorded Morning Prayer at the Washington National Cathedral as well as Veterans Events, Worship support and for special military and veterans services, including Service Anniversaries and Rolling Thunder “Blessing of the Bikes” each Memorial Day Weekend.

Maintain high visibility with DOD, VA, and BOP as well as the professional organizations for chaplains: NCMAF, MCA, and endorsing peers.

PASTORAL DEVELOPMENT

Episcopal Transitions

- Assisted Bishops and Standing Committees in plans for bishop transitions.
- Coordinated group of thirteen trained Episcopal Transition Consultants with key assistance from Judy Stark, senior consultant.
- Jointly facilitated consent process for bishops with General Convention Office and Presiding Bishop’s Office.
- Worked with dioceses in discerning individuals to be called as Bishops Visiting, Assisting, Assistant, or Provisional.
- Counseled retired bishops on opportunities for continued service to the Church.

- Served on faculty of College for Bishops programs: New Bishops & Spouses Conference and Orderly Transitions Conference.

Reconciliation and Conflict Transformation

- Served as Intake Officer for Title IV matters concerning bishop through June 2023.
- The Rev. Barbara Kempf assumed responsibilities as Intake Officer on a contract basis in July 2023 and began full responsibility in August 2023.
- Coordinated responses, with Chancellor to the Presiding Bishop, for Title III reconciliation and/or dissolution processes between bishops and dioceses.
- Served as Presiding Bishop's liaison for Diocese of Haiti matters.
- Continued to explore with lay and clergy leaders across the Church, movement toward more broad-based restorative justice practices, including formal interactions with the Standing Commission on Structure, Governance, Constitution and Canons.

Pastoral Care

- Worked with House of Bishops Committee on Pastoral Development, under leadership of the Rt. Rev. Gayle Harris (former Bishop Suffragan, MA; current Assistant Bishop, VA).
- Served on House of Bishops Planning Committee.
- Served as Presiding Bishop's liaison to Spouses of Bishops Planning Group.
- Continued to develop chaplain corps for retired bishops, spouses, and families.