# Final Report and Recommendations of the Future Committee

to the Episcopal Church in South Carolina
Diocesan Convention
November 2016

## 1. Executive Summary

The Future Committee was formed in the fall of 2015 as an ad-hoc committee of the Diocese. It was charged with identifying and studying options for the future leadership of the Diocese, and was asked to present recommendations for consideration by the Diocesan Convention.

Following its year-long work, the Future Committee offers the following recommendations:

1. **Continue the model of a part-time provisional Bishop**. The Committee believes the Standing Committee acted wisely in bringing Bishop Adams to us as our part-time, provisional Bishop. The uncertain legal environment in which we exist today, as well as the increasing but nonetheless constrained financial capacity of the Diocese, dictate that for now this leadership structure best serves the needs of The Episcopal Church in South Carolina.

2. **Engage in a Diocesan-wide visioning initiative**. As the Committee conducted outreach to clergy and laity in the Diocese, we heard many diverse voices. For example, some urged that we explicitly articulate a short-term goal of electing a full-time Bishop. Some urged reunification with the Diocese of Upper South Carolina. One recurring theme, however, was the need to examine who we have become as a Diocese, what we most value, what we believe our priorities should be, and – in prayerful discernment – where God is leading us. The Committee respectfully recommends that Bishop Adams convene an appropriate group of clergy and laity to lead the Diocese in inclusive activities designed to address these important issues.

## 2. Charge of the Committee

In September 2015, Bishop vonRosenberg and the joint committees (Trustees, Standing Committee and Council of the Diocese) commissioned the Deans of the Diocese to formulate a broadly representative and diverse committee of 12 to 16 lay and clergy to study viable options for the future leadership of The Episcopal Church in SC. The ad hoc Future Committee was formed that fall and held its first meeting November 5, 2015. The Committee was given the following charge:

- to gather information about possibilities for models of Episcopal (Bishop) leadership in the future;
- to research resources and information from diocesan groups (such as the Finance Committee and Strategic Planning Committee) in order to make an informed recommendation;
- to communicate with Deaneries about this process and to enlist responses from clergy and parishioners; and
- to report to diocesan convention in November, 2016, or at a special meeting of convention, and to make recommendations for convention approval at that time.

The Committee membership, as of November 2016, is as follows:

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| <u>Southern Deanery:</u> | <u>Peninsula Deanery:</u> |
| Emily Guess, Christ Church | Jeremy Cook, Grace Church |
| Allison Davidow, St. Mark's Port Royal | Lonnie Hamilton, Calvary |
| **Mark Szen, All Saints, Hilton Head Island | Betsy Walker, St. Stephens Charleston |
| *Dean, The Rev. Rick Lindsey, All Saints, HHI | *Dean, The Rev. John Zahl, Grace Church |
| <u>Pee-Dee/Waccamaw Deanery:</u> | <u>West Charleston Deanery:</u> |
| Lucille Grate, Holy Cross Faith Memorial | |
| The Rev. Jeff Richardson, St. Catherine's, St. Alban's, St. Stephens | **Jo Ann Ewalt, St. Francis |
| Doug Roderick, St. Stephen's North Myrtle Beach | Bill Lomax, St. George's |
| *Dean, The Rev. Wil Keith, Holy Cross Faith Memorial | Ginga Wilder, Good Shephard Summerville |
| | *Dean, The Rev. Chris Huff, St. George's |

* Ex Officio Committee Member
** Committee Co-chair

## 3. Process

The Future Committee began its work with a presentation from The Rt. Rev. John Buchanan, Bishop of West Missouri, retired, and former Bishop Provisional of the Diocese of Quincy, Illinois. Bishop Buchanan led Quincy through a reunification with the Diocese of Chicago following a diocesan split similar to that in South Carolina. He reviewed the process Quincy followed and the options that were available to it. Bishop Buchanan

identified the following potential actions for long-term Diocesan leadership available to The Episcopal Church in South Carolina:

1. Continue with a full-time Bishop (this is the most common model in The Episcopal Church).
2. Continue as a constituent diocese with a part-time Bishop (who generally has no other job).
3. Continue as a constituent diocese with a part-time Bishop who is also a part-time Rector.
4. Continue as a constituent diocese with a part-time provisional Bishop. (A provisional Bishop has served as a Bishop previously, and does not have tenure).
5. Cede portions of the diocese to neighboring dioceses.
6. Form a new diocese by junction with an adjacent diocese. (This is generally complicated and takes a significant amount of time. It must be approved by the General Convention).
7. Create a new diocese with reunification. (This generally does not take as much time as option 6, but requires approval of a majority of Bishops and standing committees).

The Future Committee then researched the implications of each option, focusing on the financial, logistical, cultural, and organizational impact each might have on the Diocese. The Committee also researched other dioceses that had experienced schisms, including San Joaquin, California, Pittsburgh, and Fort Worth, Texas.

The Committee met with leaders in the Diocese, including Bishop vonRosenberg, representatives from the Standing Committee, and the Finance Committee, along with Diocesan staff. To be as transparent and inclusive as possible, the Future Committee sent a letter to all churches, missions, and worship groups in the Diocese outlining the seven options and asking for congregants' ideas and preferences regarding the long-term leadership of the Diocese. The Committee co-chairs spoke to the clergy conference and the Under One Roof gathering, and members of the Committee were invited to approximately ten churches to speak to congregants there.

When Bishop vonRosenberg announced his retirement, the Standing Committee elected to call a part-time provisional Bishop. The Committee re-evaluated its responsibilities following this action, and determined that the Standing Committee's decision addresses the short term need of the Diocese, while the Future Committee is charged to consider the leadership needs of the Diocese on a longer-term basis. Thus, our deliberations continued.

The Committee established the following criteria for any recommendations it might make regarding Diocesan leadership:

- Flexibility. Because of the pending lawsuit the Diocese is operating in an environment of uncertainty. The Committee felt strongly that we must continue to plan for the health and advancement of the Diocese, rather than simply awaiting the outcome of the litigation. However, any actions taken by the Diocese must be flexible enough to accommodate the realities that may emerge from future court decisions.

- Diocesan Capacity. The Committee believes that recommendations for Diocesan leadership must reflect our current ability to support such leadership. The ability of our churches, missions, and worship groups to meet Bishop vonRosenberg's request for a 10 percent pledge has not yet been achieved. Diocesan wide giving in 2014 (the latest number available from parochial reports) was at 5.5% or at $364,931. Diocesan wide giving pledged in 2016 is approximately $419,889. As the figures below demonstrate, we are working to increase support, but we do not yet have the capacity to hire a full-time Bishop.

  Diocesan congregational giving for 2013-2016:

  2013: $251,973

  2014: $364,931

  2015: $376,430

  2016: $419,889 (pledged)

- Widespread Support. While there are at least seven options for the Diocese to consider, the Committee believes that any recommendations should have the support, to the greatest degree possible, of the clergy and laity. As part of its outreach initiatives to churches and to Diocesan events, the Committee heard recurring themes that served to narrow the choices to those receiving the most consideration and support.

## 4. Deliberations

As the Committee reviewed the results of the research and held conversations with Diocesan leaders and congregants, it reached a preliminary conclusion that some of the options were not appropriate for the Diocese. A summary of the Committee's observations is as follows:

1. Continue with a full-time Bishop.

A significant number of comments reflected the hope that this option could be the ultimate goal for the Diocese, but the research of other Dioceses shows that a full-time Bishop and supporting staff would likely require a minimum Diocesan budget of between $800,000 and $1,000,000. Currently our 2016 budget is $471,737.

2. Continue with a part-time (elected) Bishop.

A part time Bishop could be half-time, three-quarters-time, or any arrangement less than full-time. One issue to consider regarding this option is that the work of the Diocese may exceed the stated part-time hours, so it would be important to be clear about expectations. An elected Bishop comes with a learning curve, as he or she probably would not have previous experience as a Bishop.

3. Continue with a part-time Bishop who is also a part-time rector.

This option could introduce conflicts of interest and priorities on the Bishop's time and activities in administering both a diocese and a congregation. It would leave both the diocese and the congregation with a part-time person. After discussion, this option was rejected by the Committee

4. Continue with a part-time provisional Bishop.

A provisional Bishop would come from the house of Bishops with previous experience as a Bishop. It could be a retired person or an active Bishop. A part-time Bishop would have no tenure, and would serve as long as he or she is available or as long as our Diocesan Standing Committee sees proper. The Committee notes that the Diocese of Fort Worth currently has its fourth Provisional Bishop (since 2008).

5. Cede portions of our diocese to neighboring diocese(s).

This option would split our diocese up with certain congregations becoming part of a neighboring diocese. After discussion, the Future Committee does not consider this to be a viable option.

6. Form a new diocese by junction with a neighboring diocese.

This option would have our entire diocese become a part of a neighboring diocese (other than the Diocese of Upper South Carolina – see no. 7 below). It would require approval of a general convention of The Episcopal Church. The neighboring dioceses in our case are Georgia and the three dioceses in North Carolina. The Committee felt that this option would not be in the best interest of our Diocese.

7. Create a new diocese by re-unification with Upper South Carolina.

This option is available because the Diocese of South Carolina included the entire state of South Carolina until 1922. The Diocese of Upper South Carolina then split off and formed its own diocese. Re-unification with Upper South Carolina would not require approval at a general convention. It could be done with approval of both Bishops and standing committees. If this option were to be explored, it would be natural for an assisting (Suffragan) Bishop to be added to support the Diocese and assist Bishop Waldo in our region.

The Committee concluded that options that allow us to maintain our identity as an independent and unified diocese have broader appeal than other options. There is considerable support for and pride in our achievements and advancements in the last three and a half years. However, the Committee also believes that it is vital to consider the financial demands of operating as an independent diocese.

## 5. Recommendations

The Future Committee concludes its year-long deliberations with gratitude to Bishop vonRosenberg, Bishop Adams, and to the Deans of the Diocese, for the opportunity to serve. The Committee also thanks Calvary Episcopal Church for hosting our meetings, and we are grateful to all the parishioners and Diocesan leaders who provided us with information and comments. Finally, we would like to thank Bishop Buchanan for his wise counsel. The following recommendations to the Diocesan Convention are based on the Committee's research, outreach, and discussions.

1. **Continue the model of a part-time provisional Bishop**. The Committee believes the Standing Committee acted wisely in bringing Bishop Adams to us as our part-time, provisional Bishop. The uncertain legal environment in which we exist today, as well as the increasing but nonetheless constrained financial capacity of the Diocese, dictate that for now this leadership structure best serves the needs of The Episcopal Church in South Carolina. We cannot predict the conditions that will impact the Diocese five, ten, or more years from now. However, this option preserves our independent and unified status while affording the flexibility needed to adjust in the future as the times may demand.

2. **Engage in a Diocesan-wide visioning initiative**. As the Committee conducted outreach to clergy and laity in the Diocese, we heard many diverse voices. For example, some urged that we explicitly articulate a short-term goal of electing a full-time Bishop. Some urged reunification with the Diocese of Upper South Carolina. One recurring theme, however, was the need to examine who we have become as a Diocese, what we most value, what we believe our priorities should be, and – in prayerful discernment – where God is leading us. The Committee respectfully recommends that Bishop Adams convene an appropriate group of clergy and laity to lead the Diocese in inclusive activities designed to address these important issues.

   One might ask why such an initiative is appropriate now given that eventual court decisions may significantly alter financial and other conditions in the Diocese. The Committee believes that the past three and a half years have demonstrated that The Episcopal Church in South Carolina is strong, vibrant, and joyful, and our spiritual life is healthy. We have found faith not in buildings but in each other and in seeking the will of God. It is in that spirit that the Committee believes we must build on the strength of our recent past and engage the people of the Diocese in conversations and active visioning about our future.