

BUDGETARY FUNDING TASK FORCE

MEMBERSHIP

The Rt. Rev. James E. Waggoner, <i>Chair</i>	Spokane, VIII, 2009
Ms. Patricia Abrams	Chicago, V, 2009
Ms. Anne Clarke Brown	Vermont, I, 2009
The Rev. Reynolds Cheney	West Tennessee, IV, 2009
The Rt. Rev. George Councill	New Jersey, II, 2009
Canon Karen Noble Hanson	Rochester, II, 2009
The Very Rev. Mark Lattime	Rochester, II, 2009
Ms. Debby Melnyk	Florida, IV, 2009
Mr. Alfred D. Price	Western New York, II, 2009
The Rt. Rev. Stacy Sauls	Lexington, IV, 2009
The Rt. Rev. Andrew D. Smith	Connecticut, I, 2009
Ms. Sandra Swan	North Carolina, IV 2009

SUMMARY OF WORK

Members of the Budgetary Funding Task Force (BFTF) represent five provinces and the following interim bodies: the Standing Commission on Stewardship and Development, the Joint Standing Committee on Program Budget and Finance (PB&F) and the House of Deputies Committee on the State of the Church. Seven members served on the BFTF during the 2003-06 triennium. The Rev. Dr. James B. Lemler joined the group in 2007 as a member of the Church Center staff. He continued his participation in 2008 as a consultant. The BFTF met four times, each time at hotels near O'Hare Airport, Chicago, Illinois. These meetings were held on May 10-11, 2007; November 7-8, 2007; June 19-20, 2008; and October 2-3, 2008. The group also convened several times by conference call.

INTRODUCTION

Each BFTF meeting opened with prayer and bible study. This practice led us into deep engagement with one another and with our task, which was to continue the work begun late in the 2003-06 triennium called for by Resolution 2003-B004: "undertake a comprehensive study on the systems and procedures for funding, budgeting and expenditure of the Domestic and Foreign Missionary Society."

The BFTF report to the 2006 General Convention noted that Resolution B004 posed the question of "fairness in how we take financial responsibility for the ministry we all share in our response to the call of God's mission." While the charge given by B004 may appear to approach this question through a posture of scarcity, we hope our work will shift us toward a posture of abundance. Our giving takes on a different cast when we are clear that all we have is from God, given out of God's extravagant love.

Our work in this triennium moved from looking through the lens of scarcity, from the sense that, "It isn't working," to a sense of excitement and glimpses of new life. We were, in the words of one member, "surprised by joy."

What happened? We recognized that the charge given by Resolution B004 demands what Ronald A. Heifetz, in his work on leadership, calls "adaptive thinking." However, the specific questions outlined in the Resolution ask for "technical solutions." We found that we needed to begin with more fundamental questions and that before asking how we obtain the funds for the mission of the church we needed to ask questions about identity, vision, accountability and leadership.

This report will not offer answers to those questions, though we share below some of our reflections. Instead, this report will propose a way for The Episcopal Church (TEC), in a much broader way, to engage in a regular process of addressing them and to share in the "excitement and glimpses of new life" we have found in our work.

ADAPTIVE REFLECTIONS

Adaptive thinking examines “the gap between aspirations and reality.” The gap identified by Resolution B004 lies between the General Convention “asking” of a percentage of diocesan income to fund the mission of TEC and the reality that a majority of dioceses do not give to TEC at that level. Technical solutions may tinker with the formula, impose sanctions or, as is now the process, reshape the mission to fit available funding. Instead, we asked what would inspire Episcopalians to want to fund the budget of TEC. What would heighten the understanding that, “We are all in this together. We are interconnected. We have a common mission. We are not our divisions.” Our reflections are grouped into the following four areas:

Identity: Episcopalians share a rootedness in common prayer and the promises of our baptismal covenant. However, we discerned the need for a compelling statement of identity that would allow people across the full breadth of TEC to say, “Yes, that is who we are.” Such a statement is not about our polity, but about who we are as a particular expression of God’s people in the world. Communication is vitally important in “telling out the story” of connection and transformation experienced at all levels of the church—the story of who we are and of how we are in solidarity with one another.

Vision: We acknowledged the need for a clearly articulated common vision of our participation in God’s mission. Such a vision would reflect health and vitality for mission. It would state a clear intention about our mission as Christ’s body in the world and it would be accompanied by a plan that would help us become more effective in our witness. It should be unique to TEC and be both doable and reportable. Our Baptismal Covenant offers a foundation for such a vision—one that we are challenged to re-present in a compelling way in our current context.

Accountability: We considered accountability in terms of a rule of life that binds us to our identity and common vision, and we spoke of giving as a key part, not only of a rule of life, but also of our formation as Christians. The offertory sentence, “Offer to God a sacrifice of thanksgiving, and make good your vows to the most high,” is a reminder that our giving is an expression of thanks for God’s abundant love. We imagined a holiday gathering to which members of a community are invited to “come and bring a casserole.” The one who comes without the casserole is still welcome, because part of the purpose of asking for the casseroles is to ensure that the people come. Yet bringing casseroles is a way of speaking life to one another. It demonstrates commitment, acknowledges the gifts of others by bringing one’s own gift to share and is a sign of healthy participation in the community.

Leadership/Structure: Our conversations about identity, vision and accountability led naturally to questions of leadership and structure. Who articulates the vision of our participation in God’s mission of transformation? How do our leadership bodies and institutional structures serve that vision? Or have we adapted the vision to fit existing structures? How do we open opportunities for the church to own and use the gifts of all the baptized? Why does discussion about identity seem often to devolve into discussion about polity? We discerned the need for a clear means to support a regular visioning process, a means to encourage and allow the leadership and structures to be responsive to the vision and a budget process that supports the mission imperatives of the vision. Instead of a corporate model, might we be better served by a model that more closely relates staffing and structure to a vision/mission cycle?

TECHNICAL REFLECTIONS

While our primary focus shifted away from “technical solutions,” we do want to offer reflections on three areas we believe fall in the “technical” realm: (1) the use of a “10-10-10” giving formula; (2) the Mission Funding Initiative; and (3) the charge to address the question of “the level of the church at which mission support is most efficient.”

1. **“10-10-10” giving:** In recent years, several dioceses have decided to contribute to the church’s mission and ministry according to formulas of their own, rather than the approved formula of 21.5% approved by the General Convention. One such independent scheme called “10-10-10” teaches that each member of

the diocese will contribute a tithe (10% of current household income) to his or her parish, and that each parish will then contribute a tithe of its income to the mission of the diocese. In turn, the diocese will contribute a tithe of its diocesan income for the mission of The Episcopal Church.

The concept of “10-10-10” is based on the Biblical tithe of thanksgiving (Genesis 28:10-22) and anticipates that by teaching the tithe consistently for all giving, beginning with individual contributors, a “bigger pyramid” will result in significantly increased giving to parishes, the diocese and finally to The Episcopal Church.

Genuine questions must be raised about enshrining the tithe offering of the Old Testament as the basis for giving for the mission of the New Covenant. Even in the Old Testament, the tithe was but one of the many offerings given for the blessing of God and the life of the community. Jesus, who gave everything, looks for us to give with extreme generosity and, often indicates that people who tell him they tithe have, in fact, not yet found the grace of the New Covenant. Our church recognizes that the tithe is only a starting point in the life of giving in generosity for the gospel and the world; we have stated several times in Resolutions that the tithe is a minimum standard of Christian giving.

We believe the dioceses that choose to give just ten percent to the budget of TEC opt out of the full fellowship and responsibility we share through the funding agreement voted in General Convention, an agreement most dioceses seek to honor, each at some sacrifice.

The scheme where “10-10-10 giving” has been practiced has not resulted in the expected enhanced giving for parishes or the diocese. The “10-10-10” dioceses have not seen significant new giving, and the record of contributions from such dioceses to TEC remains at less than half of what they would have contributed had they accepted Convention’s 21.5% formula.

The vision for mission and ministry that we consider through the various Resolutions and requests at the General Convention always exceeds what we choose to support, even at the current funding levels. If additional dioceses, or all dioceses, were to adopt a “10-10-10” scheme, our ministry and common witness for Christ would be hugely diminished.

We call upon all dioceses of TEC to honor the commitment we make together at General Convention, when we vote and adopt each triennium’s new budget. When we do so, we will strengthen our common commitment as TEC and increase the support for our shared mission, entrusted to us by Christ Jesus.

- Mission Funding Initiative:** The consideration of funding initiatives outside the program budget adopted by General Convention was not part of our charge. We refer the Convention’s attention to the work of the Mission Funding Task Force. We believe it is important to reflect on such questions as, “Who owns the development function of TEC?” and “What vision and mission imperatives guide it?” The development of major gifts ought to be integrated with the vision, mission and budget articulated by the General Convention.
- Levels of church for funding:** The original BFTF Resolution charged the group with considering “the level of the church at which mission support is most efficient.” This charge asks for a breadth and depth of institutional analysis that was beyond our capacity in time, talent and cost in this triennium. We do believe this work needs to be done and that it is an important ingredient in the budgeting process that will be part of our major proposal (outlined below). Outlined below is a Resolution that will charge the BFTF to address this question and report to the 77th General Convention.

ADAPTIVE PROPOSAL

Adaptive change that aims to narrow the gap between aspirations and reality takes time, is rarely simple, requires clarity about values and a willingness to experiment with new approaches. We asked, “What could be if people

knew, owned and were connected to the vision—to the story?” This is a different question from, “How do we fix this funding story?” We became excited and energized by a suggested idea that we now call “the nine-year plan,” and we offer in the Resolution below a proposal for the General Convention to move toward adopting a cycle of vision building and mission implementation that corresponds to the term of the presiding bishop. The recent reorganization of the mission operations of The Episcopal Church Center offers a promising transition to such a mission-focused cycle of work supported by faith and human and financial resources.

Preparation for each nine-year cycle would begin during the final triennium of a presiding bishop’s term, with an intensive, church-wide visioning process that would identify goals and mission priorities—indeed, even allow them to “bubble up” through the work of the Spirit in the church—for the nine-year term of the next presiding bishop. The electing convention would begin with the presentation, amendment and ratification of the results of the visioning process. The presiding bishop then elected would have a mandate to carry out that vision and the budget would be based on its goals. The first triennium would include development of staff and structures to implement the goals, with the expectation that some positions of the program staff would coincide with the presiding bishop’s term. The work would continue through the remainder of the term, with annual reporting on progress, and the General Convention would have the opportunity to review and revise both the goals and the budget. The visioning process would begin again during the third triennium.

We believe such a process is a creative response to the need for renewed articulation of a vision formed by a shared sense of our common identity, pervasive communication of the vision and accountability to and for the vision. It will inspire a deeper sense of common mission, recognition of our bonds of interconnection and a greater commitment to fund the budget of TEC.

The Resolution asks that the Convention authorize the BFTF to continue development of this proposal during the next triennium and return to the 77th General Convention with a plan for its implementation beginning in the 2012-2015 triennium. We have found our own conversation to be both profound and exciting, and our aim is to create a way to invite the rest of the church into the conversation.

RESOLUTION A183 DEVELOP NINE-YEAR VISION AND BUDGET CYCLE

- 1 *Resolved*, the House of _____ concurring, That the 76th General Convention of The Episcopal Church receive and
2 endorse the Report of the Budgetary Funding Task Force, in particular the Task Force’s recommendations that:
3 ▪ Adequate funding of the budget of The Episcopal Church depends on (1) a compelling statement of our
4 identity as a church; (2) a clearly articulated common vision of our participation in God’s mission; and (3)
5 a pervasive accountability of church structures to that identity and common vision so that stewardship
6 and mission are linked. Specific steps must be taken to make these three goals an active part of the on-
7 going life of our church:
8 ○ Develop a common vision for mission during the triennium immediately preceding the election
9 of a Presiding Bishop for the purpose of informing the nomination and election process for that
10 office.
11 ○ Identify specific goals to be accomplished during the nine-year period corresponding to the term
12 of the Presiding Bishop (the Term Goals).
13 ○ Hold a joint meeting of the House of Deputies and the House of Bishops at the beginning of the
14 General Convention at which a Presiding Bishop is to be elected, so that the goals identified for
15 the coming Presiding Bishop’s term may be addressed, amended and ratified.
16 ○ Develop a draft budget based on identified goals and present the Budget of The Episcopal
17 Church in a nine-year cycle to coincide with the term of a Presiding Bishop (the Term Budget).
18 ○ Report on the Term Budget—and progress toward accomplishing the Term Goals in a written
19 report on an annual basis—to all bishops and deputies to the General Convention, Standing
20 Committees of the Dioceses, members of the Executive Council, members of all other
21 Committees, Commissions, Agencies and Boards, and post the report for members of the
22 Church on the web site of The Episcopal Church, as well as report on it by all means available,

- 23 especially personal visits to dioceses and provinces, in order to receive the widest possible
24 circulation.
- 25 ○ Review the Term Budget and progress toward the Term Goals at a joint meeting of the House of
26 Deputies and the House of Bishops at each General Convention to encourage accountability and
27 so that the goals may be revised as needed.
 - 28 ○ Structure the Church Center staff in order to facilitate the accomplishment of goals over the
29 course of the Presiding Bishop's term, with some positions coinciding with the term of the
30 Presiding Bishop and some being permanent in nature.
 - 31 ○ Conduct an in-depth review, regarding the accomplishment of the Term Goals during the last
32 triennium of a Presiding Bishop's term; and be it further
- 33
- 34 *Resolved*, That the 76th General Convention endorse the continuation of the Budgetary Funding Task Force and
35 charge it to produce an implementation plan for its proposals, including necessary canonical changes, for
36 consideration by the 77th General Convention; and be it further
- 37
- 38 *Resolved*, That the General Convention request the Joint Standing Committee on Program, Budget and Finance
39 consider a budget allocation of \$72,000 for the implementation of this Resolution.

EXPLANATION

The Budgetary Funding Task Force is convinced that the issues related to funding the church's pursuit of God's mission require a much more creative response than can be achieved by technical solutions such as adjusting the giving formula, mandatory giving standards or sanctions. Indeed, we believe the failure to meet giving expectations by some dioceses should be understood more as a plea to be included in the work of The Episcopal Church than a negative expression. The work, as we see it, is adaptive in nature and calls for a pervasive articulation of vision formed by a shared sense of our common identity, pervasive communication of the vision and accountability to and for the vision. Accordingly, we request that additional work toward this end be included in the budget for the next triennium so that a through discussion of specific proposals can take place at the 77th General Convention of The Episcopal Church in 2012.

RESOLUTION A184 STUDY EFFECTIVE LEVELS FOR DEPLOYMENT OF CHURCH RESOURCES

- 1 *Resolved*, the House of _____ concurring, That the 76th General Convention of The Episcopal Church direct the
2 Budgetary Funding Task Force to continue its study as to how and at what level(s) of the church's structures its
3 resources may be most efficiently deployed to communicate, foster and support our common mission.

BUDGET REPORT

The Budgetary Funding Task Force will meet approximately seven times during the next triennium. This will require \$24,000 for 2010; \$24,000 for 2011; \$24,000 for 2012; for a total of \$72,000 for the triennium.