

HOUSE OF DEPUTIES COMMITTEE ON THE STATE OF THE CHURCH

Membership

The Rev. Chris Rankin-Williams, <i>Chair</i>	California, VIII	2021
Ms. Louisa McKellaston, <i>Vice-Chair</i>	Chicago, V	2021
The Rev. Paul Canady, <i>Secretary</i>	East Carolina, IV	2021
Mr. Keane Akao	Hawaii, VIII	2021
Ms. Lindsey Ardrey	Louisiana, IV	2021
The Rev. LaClaire Atkins	Nebraska, VI	2021
The Rev. Carlos de la Torre	Central Pennsylvania, III	2021
The Rev. Canon Dale Grandfield	Bethlehem, III	2021
The Rev. Ramelle McCall	Maryland, III	2021
The Rev. Leigh Preston	East Tennessee, IV	2021
The Rt. Rev. Sean Rowe	Northwestern Pennsylvania, III	2021
The Rev. Nelson Serrano Poveda	San Joaquin, VIII	2021
Mr. Jason Sierra	Texas, VII	2021
Mr. James Simon	Ohio, V	2021
Ms. Allison Thompson	Lexington, IV	2021
The Rev. Kate Wesch	Connecticut, I	2021
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

LaClaire Atkins was appointed in January 2019. Erendira Jimenez served on the committee until February 2019.

Acknowledgements

First and foremost, we are grateful for the work of Rebecca Wilson, official representative of President Jennings on this committee, who was integral to our work and served as an essential, though non-voting member for the triennium. Many thanks to Presiding Bishop Curry and the House of Bishops for their time during our meeting in September, 2019. We wish to thank the Rev. Edwin Johnson for meeting with the survey sub-committee and providing valuable insight. Matthew Price,

from the Church Pension Group, and Ken Howard from faithX were instrumental in providing helpful information for the parochial report revision. We're grateful to the Executive Council for their part in working with us on the parochial report. We also appreciate the work the General Convention Office staff has done for us this triennium. Thank you to The Episcopal Church Archives for compiling the report contained in the appendix of this report. Finally, thank you to all who offered feedback to the parochial report in particular and to those who responded to our survey.

Mandate

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.

Summary of Work

Introduction and Mandate

In September 2018, House of Deputies President Gay Clark Jennings appointed 19 people, all members of the Millennial and GenX generational cohorts, to the House of Deputies State of the Church Committee for the 2018-2021 triennium. In her charge to the committee, she wrote:

"This triennium, I am asking the House of Deputies State of the Church Committee to do a new thing—to be an energetic think tank and incubator for adaptive thinking, innovative ideas, and fresh approaches to the church's leadership, organizational thinking, and common life. Rather than issuing a charge to explore specific issues, I am instead asking the committee to identify, study and report on the Episcopal Church's most significant opportunities to innovate and experiment so that we are equipped for 21st century mission and ministry in our congregations, communities, and countries.

Part of your work will be to fulfill Resolution 2018-A053, which directs the design of a new parochial report 'relevant to the diversity of the Episcopal Church's participation in God's mission in the world.' The rest of your time will be spent exploring how we can find new ways to foster the participation of all Episcopalians in that mission. As a mark of my commitment to fostering innovation, exploration

and fresh leadership, I have appointed no Baby Boomers to this committee; it may be the first churchwide body since the 1960s to carry that distinction!"

The committee, which soon dubbed itself Hot Sauce (a creative pronunciation of HoD SOTC), met first at the Maritime Center in Linthicum Heights, Maryland from November 11-14, 2018, alongside many other interim bodies. At that meeting, we spent significant time identifying themes and priorities for our work together. Both President Jennings and Presiding Bishop Michael Curry also spent time with us reviewing our initial work and sharing their perspectives.

Over the course of our monthly online meetings in the first half of 2019, we worked to consolidate our initial list of twenty questions to prompt adaptive change experiments in the church into four key inquiries:

- Can the Episcopal Church be less hierarchical and instead be more like God's kingdom?
- What does it mean to belong/be a member of an Episcopal Church?
- How do we actively dismantle systems of power in the church that belittle, marginalize, oppress, and limit our imagination?
- What is the vision, need and call for Christian leadership in the world?

To explore these questions, we decided to seek data from both the House of Deputies and House of Bishops.

Meetings

We were very grateful to Presiding Bishop Curry for inviting us to meet with the House of Bishops at its meeting in Minneapolis from September 18-21, 2019. We are not aware of any other State of the Church Committee that has been invited to meet with the House of Bishops, just as we believe that we are the only State of the Church Committee in Episcopal Church history to include a bishop: Bishop Sean Rowe.

During our time in Minneapolis, we held our second in-person meeting at a hotel near the House of Bishops meeting site, and on the morning of September 19, we met for two hours with the members of the House. The data we gathered during that meeting is included in this report.

We continued meeting monthly after returning from our meeting in Minneapolis with the hope of launching a survey for deputies and alternate deputies early in 2020. Although that work was delayed

by several months due to the COVID-19 pandemic, we did conduct the survey in November and December of 2020; our methodology and results are detailed below.

During the pandemic, our monthly Zoom meetings and sub-committee meetings became a source of sustenance for many of us whose lives, studies, and jobs were upended by COVID-19 and the epidemic of racial injustice. As we worked and cared for one another, we sought to embody the kind of community that we long for the church to be.

Due to the pandemic, our in-person meeting scheduled for September 16-18, 2020, was moved to Zoom, and during that meeting, we finalized both the House of Deputies survey described below and the 2020 revision of the parochial report, also described below.

We continue to meet monthly via Zoom. While this report to the General Convention covers only our work through March 1, 2021, President Jennings has charged us to continue our work through the 80th General Convention in July, 2022.

We plan to continue fulfilling President Jennings's mandate to us and to continue assessing the ways in which the COVID-19 pandemic has impacted and will continue to impact the Episcopal Church, and we hope to provide the General Convention with a supplemental report on our work from March 2, 2021-June 1, 2022. In particular, we expect that our Membership Subcommittee, which was unable to complete its work by March 2021 due to COVID-related issues, will present a report and related resolution(s) to the General Convention.

Challenges

At our initial meeting, we committed to conducting our work in the spirit of adaptive change, recognizing that we do not currently have the tools, or even the ability to define, the challenges that the church faces. In our effort to work adaptively, we identified several challenges that the church must address in order to make future adaptive change work possible:

Research capacity: The Episcopal Church currently has no meaningful capacity to collect and analyze data in a coordinated way. We faced these limitations both in attempting to analyze the qualitative data we collected at the House of Bishops meeting we attended and in creating a survey for the House of Deputies and analyzing data from it. While we were working, we also observed other interim bodies struggling to conduct research, and the effect of too many overlapping surveys being put in the field by disparate committees with no way to coordinate. As a result, we are proposing a resolution asking the General Convention to create appropriate research and data analysis capacity

at the churchwide level and to ensure that it is available to interim bodies charged to carry out the resolutions of General Convention.

Collaborative tools: Early on, we committed to working collaboratively and forming a community of practice that would embody the kind of church we envision. When the COVID-19 pandemic began, our need both to collaborate online and stay connected with one another increased. Unfortunately, the primary tool available for interim body work--the Extranet--is woefully inadequate. We employed a variety of workarounds--Google (Drive, Docs and Sheets), Facebook, and email, but it is clear that to have any hope of facilitating collaborative work that can bring about meaningful change in the church, we must allocate money for state-of-the-art collaborative tools customized or developed by experts in the field. We are proposing a resolution to ensure the development of these tools is a priority in time between the 2022 and 2024 General Conventions.

Mindset: We are exceptionally grateful to President Jennings for charging us to “be an energetic think tank and incubator for adaptive thinking, innovative ideas, and fresh approaches to the church’s leadership, organizational thinking, and common life.” During the course of our work, we have learned how difficult it is to switch in and out of an adaptive mindset, and how truly challenging it is to imagine large-scale culture change in the church. We will continue to wrestle with this work until General Convention 2022; we urge the presiding officers and the General Convention to identify a group of people committed to adaptive change principles to work over a sustained period of time, with adequate resources for outside consultation, data gathering and analysis, and evaluation, outside the constraints and timelines of the usual interim body processes and restrictions.

Data from the House of Bishops

Following a presentation to the House of Bishops about our mandate, our vision for the church and what we hoped to accomplish during the triennium, each State of the Church Committee member joined one of the House of Bishops’ table groups. Our goal was to have informal conversations about the church and to hear directly from bishops about their hopes for the church, their challenges in ministry, successes in their dioceses and their visions for the future.

Members of the SOTC Committee used a common list of questions to guide discussion with bishops at their table. The list was ambitious, but many tables were able to answer them all:

- What is your dream for the Episcopal church?
- What traditions, policies, and practices, etc. stand in the way of making this dream a reality?
What part of being a bishop do you like most?

- What would you give up if you could?
- Outside of canonical definitions, what does it mean to be a member of a parish or worshipping community?
- How do you measure engagement and membership?
- How do you share authority with clergy and laypeople in your diocese?
- What about that system works? What doesn't work?
- In what ways have the structures and norms of the church kept you from addressing racism and other forms of discrimination?
- Are there times when you have experienced discrimination as bishop?
- Where do you see creative and faithful ministries in your diocese? Describe the most innovative ministry in your diocese and how it is supported.

The responses were diverse, depending largely on geographic location, tenure of bishop, and financial resources, which are also the factors that often determine the nature of the challenges faced by each bishop. At least one bishop in each group reported that congregational visits are their favorite part of the job, and generally there is a common desire to work together to move the church through the 21st century with love and care.

In overwhelming numbers, bishops enjoy spending time with the people of their dioceses and find cases adjudicated through the Title IV disciplinary process to be burdensome. Institutional inertia, protocols and procedures are cited as huge barriers to ministry by many bishops, and that institutional constraints can take time away from ministering directly with people and communities and inhibit creativity in work and ministry. When asked how they share authority with clergy and lay people in their dioceses, many indicated that they strive for involvement and parity with their clergy and lay members, and more than a few indicated that they do not share their authority.

Bishops' dreams for the church are not dissimilar to those of many laypeople and clergy. There is a common desire for adaptation that includes moving beyond being tied to buildings and operations. While buildings can be an essential tool for ministry, the church too finds itself weighed down by the cost of building maintenance. Finding a way to move beyond the constraints of our buildings, while a complex task, will likely prove even more essential in the future.

Overall, bishops cite working together to be a new community, representing God's Dream and living into the Beloved Community, as the vision they believe will be most unifying for the church. They hope that the church will increase its commitment to be a movement of disciples.

Bishops find that their role as teachers is often pushed to the back burner due to their time-consuming institutional responsibilities. Several bishops long for the opportunity to do more teaching at every level than is currently possible. Although the job of bishops has come to mean many things and varies widely by diocese, many bishops express a desire to return to their primary vocational functions of preaching, teaching and leading rather than carrying out executive and administrative roles such as CEO, operations director, manager, etc., for which many bishops find themselves unprepared. Bishops recognize that their job must entail some of these executive and administrative duties, but they believe that it need not be the primary focus of the episcopate.

Bishops have a myriad of responses to questions about their personal experiences of discrimination and their efforts to address it on an institutional level. Bishops who are white recognize their discomfort with acknowledging the privilege of being white. The fact that the Episcopal Church has only recently, as an institution, come to terms with the need to address the sin of racism in the church, have made it difficult to address racism and discrimination as a long-term priority, rather than a one-off class or study. Bishops who identify as female reported not always being included the same way their male identifying counterparts are in their local contexts.

In addition to gaining a clear sense of the challenges that bishops encounter and their perspective on the issues we had identified as our focus, committee members had the opportunity to talk informally with bishops and bridge gaps that sometimes exist between young leaders and senior ones. In our presentation, we challenged the bishops to ensure that no member of the SOTC Committee had to pay for their own lunch that day, and in that, we were completely successful: all members of the committee were invited to lunch by a bishop at the session's close.

Data from the Councils of Advice for Ethnic Ministries

In January 2020, SOTC member Leigh Preston was able to lead a discussion at the Councils of Advice for Ethnic Ministries using the same questions we asked in small group discussions at the House of Bishops. We are grateful to Leigh and to the Councils of Advice for Ethnic Ministries for participating in this discussion. A summary of their responses is included here:

When asked about their dream for the Episcopal Church, council members expressed the desire for more opportunities for learning and training, noting that while worship is extremely important, we also need to focus on building capacity in other areas of ministry. Council members identified the need for culturally significant practices for indigenous and other ethnic communities to be honored and embraced by the church. Like many members of the House of Bishops, council members urged a

focus on being disciples, rather than caring for buildings. They said, “We must go beyond preservation.”

Barriers to these dreams and hopes for the church’s future include the allocation of resources and funds and church finances. Council members urged the church to examine if our policies are in line with what people want and need, and cited too much bureaucracy, a fear of evangelism, and lack of diverse theology as problems to be addressed.

When asked about how to define church vitality, and how to assess the strength and viability of a congregation, council members emphasized diversity and the importance of raising up new leaders and equipping them for ministry. They commended to congregations several questions: How many ministries are offered? Is the building or space used by the community? If the church were gone, would it be missed? Many council members emphasized the need for congregations to acknowledge that churches don’t exist for their members, but for their communities.

When asked about their experiences of discrimination in the church, council members frequently cited tokenism—being asked to be the one person who fulfills the diversity requirement in a group. Too often, groups or congregations say that they value diversity but are not willing to do the work to become truly diverse. In particular, the process of discerning a call to ordained ministry is not always open or available, in practical terms, to minorities; it often privileges those who are able to take a break from work or family life. Women and people of color still make less than their white male counterparts. Members of the councils hope that the church will undertake serious, ongoing study of these issues, and that changes to our system or canons will result in pay equity across the board.

Council members cited innovative ministry taking place where youth ministry is funded and promoted, where people of color have a voice on bishops’ or diocesan staffs, and where the culture of different ethnicities are being shared with the entire church. The council expressed the desire to have a more collaborative space to set and share goals.

Data from the House of Deputies: Survey Subcommittee

In 2020, we formed a subcommittee to develop a survey for lay and clergy deputies. The goal of the survey was to gain anonymous feedback on General Convention, particularly the accessibility and efficiency of the day-to-day business of convention while in session, as well as to explore general challenges and opportunities facing the church. The survey was sent electronically to deputies and alternate deputies to the 79th and 80th General Conventions. We aimed to have as wide a reach as possible, while making sure those surveyed would be able to answer from experience the questions being asked.

The survey, issued in both English and Spanish, consisted of 22 questions, some of which were multiple choice and some of which were free-response. Of the 644 respondents, nearly 60% were current deputies, nearly 29% alternate deputies and the remaining were former deputies or alternate deputies. Just over 51% of the respondents were in the lay order, while just over 48% of respondents were clergy. Respondents identified as male and female in about the same numbers, and several respondents chose not to identify their gender or identified as either non-binary or transgender.

Over 80% of those who responded identify as white, while just over 10% identify as Black, African American, Afro Caribbean or African immigrant. Just under 2% identified as Indigenous, Alaskan Native or Native American, 1.86% identified as Asian, 1.4% as Latino/a/x, under 1% as Hawaiian or Pacific Islander and just under 2.5% preferred to self-describe. Although the percentage of Black deputies who responded is equivalent to the percentage of Black deputies in 2018, the percentages of Latino/a/x, Asian, and other people of color who responded are slightly lower than the percentage of deputies who identify with those race and ethnicity descriptions.

Half of the survey responses came from those born between 1946-1964, the cohort commonly identified as the Baby Boomers, and another 25% were born between 1965-1980; the years of the Gen X generation. Those born between 1981 and 1996--the Millennial years--constituted 12.4% of respondents. Another 11.8% of respondents were born between 1928-1945--the years of the Silent Generation's birth--and just under 1% of those surveyed were born after 1997, in the years that are coming to be known as the birth years of Gen Z.

While the subcommittee was hoping for a more racially diverse group of respondents, we recognize that the demographics of respondents in fact represent the membership, historically and currently, of our church. That is, historically, predominantly white⁽¹⁾. The church continues to work toward full inclusion and of non-white members and the equality of all members of the church, but diversity, equity and inclusion efforts, particularly racial justice and reconciliation work, require sustained effort. We will not be able to live fully into God's dream for the church until we make this effort as a whole body, with our whole hearts. In fact, when asked in this survey how urgent the work of dismantling systemic racism is, 91% of deputies said the work is urgent.

Several survey questions focused on the work of legislative committees. Nearly 40% of deputies who took the survey responded that they have served on a legislative committee at at least one General Convention. The majority believe legislative committees to be efficient to highly efficient, and just under 10% stated that legislative committees are inefficient to highly inefficient. Legislative hearings were rated nearly the same in each category. When given the opportunity to provide independent answers, more than half who provided individual feedback indicated that having legislative

committees convene via video or teleconference before the start of convention would be a benefit not only to the work of the committees, but also to the efficiency of the whole convention. Respondents also favored having legislative committee meetings and especially legislative hearings conducted virtually, believing that doing so would allow greater access to these proceedings. Overall, the legislative process was deemed efficient by the majority of survey respondents.

Efficiency for the House of Deputies' legislative sessions was rated as efficient by 38% and highly efficient by nearly 16%. Nearly 20% felt neutral, and just under 11% perceived legislative sessions to be inefficient or highly inefficient. Much of the free response feedback concerning the efficiency of convention overall suggested that legislative committees meet ahead of convention, that convention be shortened, or in some cases, that the number of attendees be reduced. Many respondents suggested limiting the number of resolutions that may be presented, or limiting the types of resolutions which may be presented. Many suggested that resolutions should be considered only if they have an immediate effect on the church, and some suggested that resolutions concerning government policy should not be considered. While all of the feedback is appreciated, the subcommittee believes that, in order to be faithful to our call to respect the dignity of every human being, it would be irresponsible to consider only those resolutions that have a direct or tangible outcome, or are limited to ecclesiastical matters. Our involvement in the broader community and world is paramount to our ministry as Episcopalians.

The vast majority of respondents do not have minor children living at home. Among those who do, some indicated that their responsibility to care for children negatively affects their ability to participate in General Convention, and some were neutral on the issue. Several members of the State of the Church Committee are parents of young children, and we understand that taking time away for nine-plus days can be a significant challenge. Traveling and caring for an infant while serving as a deputy, paying for additional childcare at convention or at home, delegating responsibility to other family members while away, and managing the financial strain of all of these factors is significant. Survey respondents strongly supported providing childcare at convention without making it a financial burden to deputies or dioceses, and having childcare available during all times business is conducted, including legislative committee meetings and hearings.

When asked to prioritize one change to General Convention, 32% of respondents said they would make it shorter, and 23% would make it more affordable. In the free response, those two options were linked; many deputies stated that making convention shorter would also make it more affordable. Those who suggested allowing fewer resolutions indicated in their response that doing so would help make convention shorter. A handful of respondents included convening General Convention more often. This approach would not necessarily make the Convention more efficient,

because there would still be scheduling and affordability challenges, as well as increased burdens for travel on deputations. Additionally, the work of interim bodies would be abbreviated and valuable work during the triennium might be inhibited. Of course, now that virtual meetings have become the norm, the use of videoconferencing would make it possible to meet more regularly without the added time and expense of in-person meetings.

In the survey of deputies, we also sought to gauge the energy for restructuring the church. Specifically, we asked if deputies thought restructuring the church was a priority. Slightly more than half of deputies answered “yes” to the yes-or-no question. We then asked respondents what restructuring the church looks like to them. As one might imagine, the ideas and goals named varied widely. Some of the most common themes were:

- Sharing authority, so that responsibility is more evenly distributed between bishops, clergy and lay people;
- Finding ways to move church offices to a more accessible and less expensive location than New York City or have offices spread out geographically;
- Rerouting funds from literal brick and mortar operations back into churches, in particular small and rural congregations;
- Utilizing technology and the ability to gather virtually to our advantage by traveling less for meetings and making meetings more accessible for all;
- Evaluating the number of dioceses and explore merging some of them; addressing overlaps in the oversight of church staff and interim bodies;
- encouraging bi-vocational clergy and provide training and resources for those clergy and the lay leaders of the congregations they serve;
- Addressing the high monetary cost of the health plan required for full-time clergy and church employees, which is increasingly becoming a barrier to congregations hiring a full-time priest;
- Changing the way we meet and worship to meet the current needs and realities of peoples' lives;
- Focusing on evangelism and outreach more than inner church workings and governance;
- Fostering greater community engagement - recognizing and embracing lay leadership in congregations, diocese and the greater Church;
- Using the lessons of being church during the the Covid-19 pandemic to figure out our future priorities; and

- Acknowledging our part in systemic racism, providing training and resources for anti-racism work, and helping those who have been hurt by the church find healing.

There were a handful of suggestions about making deputations smaller. The committee understands that for the most part this suggestion was meant to reduce the costs and length of General Convention. We suggest that the General Convention budget provide financial resources to assist dioceses for which the cost of sending a full deputation to General Convention is a barrier.

The survey also sought to assess the barriers to ministry faced by deputies and their congregations and dioceses. Deputies were asked to choose as many as applied from this list:

- buildings
- geographic isolation
- racism
- funding
- gender discrimination
- homophobia
- structures of authority
- barriers to technology
- ordination process
- clergy shortage
- lack of lay leadership training
- lack of clergy training
- other

Funding is the most commonly cited obstacle, at 69%, followed by lack of lay training at 53% and racism at 39%. Access to technology and structures of authority followed, with just over 30% and just under 30%, respectively. Geographic isolation is also a major concern. A small number, about 8%, chose every single option presented. While this number is not huge, this committee wishes to make a note of these findings.

Other responses included burnout of leaders (both clergy and lay), lack of access to creative liturgy and music, lack of time and people, lack of bilingual clergy, divisions in congregational, diocesan and wider church structures, and the pandemic.

Respondents were also asked to select their primary obstacle from the list. Funding was again cited most often, followed by lack of lay leadership training, structures of authority and “other.” The “other” responses again highlighted burnout, apathy, lack of vision, administrative demands, classism and aging membership.

Innovative Ministry

The survey also asked deputies about innovative ministries happening in their contexts, and this question resulted in a high volume of responses. Many deputies are encouraged by the work their diocese is doing to address racism and work toward racial reconciliation by introducing programming, developing more robust programming and working directly in communities to build relationships and create shared ministry. Social justice outreach remains a strong priority.

Many respondents reported live streaming or pre-recording their worship services during the COVID-19 pandemic. It is important to recognize that in this pandemic time, when we have been forced to be adaptive, that online worship is indeed innovative, especially for a denomination that has strongly resisted, on the whole, worship outside of church walls. And it is equally important to recognize that this is still something which is not an option for many in our church, whether due to a congregation not having the ability or technology to provide virtual worship, or for parishioners who are unable to access the technology needed to attend virtual worship. These disparities must be addressed. At the same time, several respondents highlighted new Spanish-speaking services or congregations, and many reported worship and outreach initiatives to Indigenous people. These ministries must continue and expand.

Many congregations worked to supply their members with items for worship, particularly Advent baskets with candles and prayers, ashes to go baskets with ashes and prayers, and other forms of tangible outreach. Drive-by blessings or other services have been created. We are grateful for and inspired by this work and witness.

Based on survey responses, many congregations are hosting food pantries and clothing drives and are responding to the needs of those suffering from addiction. Some have also been able to offer laundry services for homeless people, grab-and-go meals, shelters and clinics. Our church buildings offer meeting spaces, provide counseling centers for those struggling with addiction and welcome those who live on the edge of society. This is essential work.

Other innovative ministries reported include art camps, vacation Bible school camps, hybrid summer camps to accommodate pandemic restrictions and reach out to the younger members of communities. In many cases this has brought newcomers to congregations. Creative formation has

been available to many age groups, including seniors, during the pandemic, helping alleviate the isolation which has plagued so many people during the past year.

Our committee was inspired by all of the responses, and especially by the clear commitment to being Christ in the world.

Racial Justice and Anti-Racism Training Responses

Nearly 73% of respondents answered that they have attended some form of anti-racism training lasting longer than five hours. 174 have either not completed a training, or it was under five hours in length.

Respondents were asked to select from a variety of anti-racism trainings and asked them to select which one(s) they have attended. The list comprised: Sacred Ground, Seeing the Face of God, Racial Equality Institute, VISIONS, Kaleidoscope, Crossroads, Dismantling Racism or “other” and invited them to list whatever trainings fell under “other.” Trainings not listed in our dropdown, in the “other” category, represented the highest number of trainings deputies have taken. Dismantling Racism has the highest number of attendees at 158, with Racial Equality Institute the fewest at 19. The other trainings fall between those, with between 30 and 90 attendees each.

Several trainings listed in the “other” category, identified by the deputies who answered, include programs provided by their diocese, seminary or congregation. The Absalom Jones Center and Becoming the Beloved Community were mentioned specifically. Some indicated that they have taken a training with a church-wide committee, commission, board or Executive Council. We are encouraged that several deputies indicated that their diocese is rolling out an anti-racism training or program. Others have taken training through a non-church workplace or other denomination’s training, and many are reading to educate themselves.

We note that a number of deputies reported that they have attended programs that are not actual anti-racism trainings, including Safeguarding God’s Children, The College for Congregational Development and Living Compass. A number also reported diocesan-level trainings that did not go well, and made attendees of color feel discriminated against because of either the presentation of material or content of material. When anti-racism trainings are offered, the curriculum, presentation and overall experience of attendees should be carefully considered. Input on content and experience should be sought from members of the community or diocese, especially members of color, to avoid any participant feeling less than or discriminated against.

Nearly 42% of deputies believe that racial justice work in the church is “extremely urgent.” 36% report it as “urgent” and over 12% as “somewhat urgent.” Those indicating “neutral” or “not urgent” were below 10%.

Parochial Report

The House of Deputies Committee on the State of the Church has canonical responsibility for approving the content of the Parochial and Diocesan Reports, which are then authorized by Executive Council for use. This triennium, the State of the Church Committee has been responsible for designing a new parochial report based on resolution 2018-A053.

2018-A053 Design a New Parochial Report

Resolved, the House of Deputies concurring, 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 simplified parochial report relevant to the diversity of the Episcopal Church’s participation in God’s mission in the world, and be it further

Resolved, that the House of Deputies Committee on the State of the Church solicit input from critical parochial report stakeholders including: (1) data providers to ensure that the data is easily collected and compiled and (2) data users to ensure that the data collected is relevant to their work, and be it further

Resolved, that the user interface be improved both for entering data and downloading data and to provide an application programming interface to allow data to be integrated into other networked tools for broader sharing and analysis.

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. A comprehensive report should capture qualitative data in addition to the quantitative data that has been the standard for the parochial report in recent history.

Likewise, the church communicates what it cares about by what it measures. This has led to an overemphasis on average Sunday attendance (ASA) as a stand-alone metric rather than viewing it in context, and critiques that the church is interested in attendance and finances only and not other indicators of vitality.

Canonically, only four questions are required on the parochial report:

- The number of baptisms, confirmations, marriages and burials during the year
- The total number of baptized members
- The total number of communicants in good standing
- The total number of communicants in good standing under 16 years of age.

In preparing to draft a new parochial report, a sub-committee conducted interviews with members of the House of Bishops, staff of the DFMS, including the General Convention Office, and the Church Pension Group. Feedback and recommendations were also solicited on social media platforms, including Facebook groups for Episcopalians and parish clergy.

To better understand the history of the parochial report, the President of the House of Deputies commissioned a research report from the Episcopal Archives titled, “Development of the Annual Parochial and Diocesan Report” (April 2019). It is included as an appendix to this report.

The parochial report subcommittee also reviewed congregational reports from different denominations, including the ELCA, to determine best practices. Of note is a shift in the ELCA to tracking Average Weekly Attendance instead of Average Sunday Attendance and a greater emphasis on total active participants in the congregation.

Using this data, the State of the Church Committee began work on a revision of the parochial report that includes more comprehensive demographic data that can be tracked over time; metrics that give a fuller picture of active participation; engagement with the wider community; narrative questions; and a finance page that is easier to complete.

The State of the Church Committee is also responsible for the Diocesan Report that all dioceses submit. Each diocese has its own formula for calculating congregational assessment or apportionment. Some dioceses use parochial report data to collect this and others do not. We discovered that there is no central database that collects the assessment formula for each diocese, so we added that question to the Diocesan Report.

The work on a full revision of the parochial report was suspended when it became clear the COVID pandemic was having a dramatic impact on the life of congregations. In consultation with Executive Council, we made the decision to develop a special 2020 edition of the parochial report to address the reality of the pandemic. Our desire was to capture how churches responded to the pandemic, particularly in the area of worship, so that best practices could be identified. We made the decision not to track online attendance data for 2020, but to gather data about how congregations worshipped online and to work on developing a standard that could be used for online attendance

as distinct from in-person attendance. We also added narrative questions and questions on racial justice and reconciliation to the report.

It is essential that the church do more comprehensive analysis of responses to the parochial report, including the qualitative narrative questions. The church at all levels should use parochial report data analysis to help make decisions for the future. The very real picture of decline needs to be understood in context, and greater attention should be given to identifying indicators of vitality. Our resolution asking the General Convention to allocate funding for research capacity would help achieve that goal.

In 2021, the State of the Church Committee will revise the 2020 edition of the parochial report so it can be used to collect 2021 data, and then return to our original project of developing a full revision of the parochial report to submit to Executive Council. General Convention must approve only revisions to the report that impact its canonical requirements.

In recent years, as denominational loyalty has lessened and understanding of membership have shifted, particularly among younger generations⁽²⁾, the category of “communicant in good standing” has become more difficult for many congregations to track and less reliable as a way to measure active lay participation. Particularly in some geographic regions, formal letters of transfer are seldom used and people may come to Episcopal churches from denominations in which their baptisms were not recorded. As congregations gathered online during the COVID-19 pandemic, communicants in good standing became even more difficult to measure, as many people attended worship online at churches geographically distant from them. The rise of hybrid worship in the wake of the pandemic many mean that many continue to do so. Because the category of “communicant in good standing” is used extensively in the Constitution and Canons of The Episcopal Church and in many diocesan canons, further work is needed to refine how the Episcopal Church understands membership and how eligibility to participate in church governance should be assessed. Our Membership Subcommittee intends to continue this work and to present a report and related resolution(s) to the General Convention in 2022.

Likewise, further work is needed to establish context for membership and attendance data collected in the parochial report. In some regions of the United States, as much as 40% of people attend church each week, whereas in other regions, the number is half that⁽³⁾. Similarly, the percentage of baptized Episcopalians who attend church each week varies by region, from 26% in Province II to 35% in Province V⁽⁴⁾. These geographical and cultural variations both in the Episcopal Church and in the broader culture need to be taken into consideration when comparing Average Sunday Attendance

numbers across the church and using attendance data as a measure of church vitality. We hope to address these issues in our remaining work and revision of the parochial report.

In addition, while the General Convention Office does receive some ministry reports from non-parochial ministries, at present there is no method for tracking worship attendance at Episcopal schools, camps and conference centers and chaplaincies. As a result, a true picture of the reach and impact of the church is missing. We intend to address this issue in the full revision of the parochial report that we will submit to Executive Council.

The State of the Church Committee is continuing its work on the parochial report beyond the Blue Book deadline. Working with Executive Council and coordinating with the General Convention Office on implementation, the committee will complete a full revision of the parochial report prior to General Convention in 2022.

Recommendations:

- The House of Deputies State of the Church Committee and Executive Council should review the parochial and diocesan reports every triennia and make revisions as needed to ensure relevancy of the reports.
- Further work is needed to evaluate the canonical category of Communicant in Good Standing to determine if it still serves the church well. Communicant in Good Standing is so interwoven into the canons and church governance that a significant effort would be needed to adjust or change this canonical category to better meet the adaptive reality of the church today. Our Membership Subcommittee will begin this work before General Convention in 2022 and plans to present a report and related resolution(s) to the General Convention in 2022.

End Notes

(1) Demographic information on the House of Deputies is available for the 79th General Convention in 2018: <https://houseofdeputies.org/2018/07/03/demographics-of-the-house-of-deputies-at-gc79/> , and for the 78th General Convention in 2015: <https://houseofdeputies.org/2015/08/04/demographics-house-deputies/>

(2) <https://www.pewresearch.org/social-trends/2014/03/07/millennials-in-adulthood/>

(3) <https://www.pewforum.org/religious-landscape-study/compare/attendance-at-religious-services/by/metro-area/>

(4) <https://www.generalconvention.org/membership-and-average-attendance>

Proposed resolutions

A097 Evaluating Experiments in Adaptive Change

Resolved, the House of _____ concurring, That the Presiding Officers' decision to convene legislative committees and resolution hearings in advance of the 80th General Convention be commended as an experiment that can help the Episcopal Church learn more about how to adapt its structures and governance to the post-COVID world; and be it further

Resolved, that Executive Council conduct, with professional support from program evaluation specialists, an evaluation of the process by which legislative committees and resolution hearings convened online in advance of General Convention and of the outcomes for the church; and be it further

Resolved, that the evaluation include assessment of the ways in which conducting legislative committee business online promoted or hindered diversity, equity and inclusion and the involvement of people in the wider church, particularly people of color, people younger than age 40, and people from dioceses outside the United States; and be it further

Resolved, that Executive Council conduct this program evaluation with the intent of creating a model for evaluation of future adaptive change experiments, recognizing that the Episcopal Church must continue to change and evolve in order to respond to God's mission in all of its contexts.

EXPLANATION

The Episcopal Church must develop the discipline of making experimental changes in its polity, governance and structure and evaluating those experiments. By learning to experiment without fear of failure or retribution, gather evaluative data, and then refine our experiments, we will be more able to face the challenges facing the institutional church and to participate in God's mission in the 21st century.

A098 On Online Tools for Adaptive Leadership

Resolved, the House of _____ concurring, That the 80th General Convention direct the Executive Council to oversee the development of collaborative online tools that can facilitate the work of interim bodies committed to leading adaptive change in the Episcopal Church; and be it further

Resolved, that the chair and vice-chair of Executive Council, in consultation with the Executive Council Joint Standing Committee on Governance and Operations, appoint a task force of experienced churchwide leaders to make recommendations about the range of communication and collaboration tools needed to support adaptive change work, including tools that will facilitate real-time collaboration, be responsive on mobile devices, and entirely replace the current Extranet platform; and be it further

Resolved, that the General Convention Office be directed to implement the recommendations of the task force in time for use by the 81st General Convention; and be it further

Resolved, that \$250,000 be budgeted for the subscription, development and implementation of these tools.

EXPLANATION

Despite significant investment of time and money, the Extranet is a hindrance to the kind of real-time collaborative work required to facilitate adaptive change in the church. The Extranet is not intuitive, it does not provide the options for real-time interaction, and it does not thread messages. Leaders who have been stymied by its inadequacies have been forced to informal use of other tools; as a result, information and records about the work of churchwide bodies is dispersed and often unavailable. Especially during the pandemic, the church's lack of capacity to collaborate has significantly limited the ability of its leaders to respond to rapidly changing circumstances and contexts. The leaders who are most in need of tools that work, and who have been most affected by the inadequate nature of the current platform, should lead this work.

A099 Research Capacity for The Episcopal Church

Resolved, the House of _____ concurring, That The Episcopal Church establish and fund significant professional research expertise and capacity to collect, aggregate, analyze, and publish data to support and bring insight, facts and understanding to the work of the General Convention, the Executive Council and all commissions, committees, boards and task forces of the church; and be it further

Resolved, that The Episcopal Church prioritize developing data expertise and capacity to advance adaptive change processes, including experimentation and evaluation, that can invigorate the church's participation in God's mission in the 21st century; 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 \$450,000 for the implementation of this resolution.

EXPLANATION

During its work in this triennium, the House of Deputies State of the Church Committee, charged with being “an energetic think tank and incubator for adaptive thinking, innovative ideas, and fresh approaches to the church’s leadership, organizational thinking, and common life,” found itself limited by the Episcopal Church’s lack of meaningful capacity to collect and analyze data in a coordinated way. Other interim bodies also struggled to formulate and conduct research, and at times, many overlapping surveys were put in the field by disparate committees with no way to coordinate. In order for the Episcopal Church to be the body of Christ in a world that badly needs our witness, we must have professional research expertise capacity that can help us reclaim and reinvent the church.

Supplemental Materials

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1. [Development of the Annual Parochial and Diocesan Report - The Archives of the Episcopal Church - Research Report - April 24, 2019](#)

**The Archives of the Episcopal Church
Research Report
Development of the Annual Parochial and Diocesan
Report April 24, 2019**

Sources of Authority

The first canonical legislation, “providing for an accurate view of the State of the Church,” was enacted in 1804, when the General Convention mandated regular annual reporting by the clergy of their sacramental acts and the adult persons in their cure. This canon (now I.6) serves as the core of the current data gathering process and its oversight as assigned by General Convention. The State of the Church Committee (the Committee) was created in 1808 to shepherd the reporting process. It recommended the first standardized form in 1874, but the mandatory use of a standard form and fixed due dates was not established until 1916.¹ In 1958, responsibility for preparing the form was canonically transferred from the Committee to the National Council.²

In addition to Canon I.6, the parochial report must conform to other canonical provisions. The effective canons are currently numbered:

- Canon I.4.6(k). Diocesan report on congregations
- Canon I.7. Of Business Methods in Church Affairs
- Canon I.17. Of Regulations Respecting the Laity
- Canon II.1. Of the Due Celebration of Sundays
- Canon III.9.6. Rectors and Priests-in-Charge and Their Duties
- Canon III.12.3. Duties of Bishops

Evolution of the Parochial Report Process and the State of the Church Report

A survey of parochial reporting in the early decades after 1808 showed a wide variety of styles, which ranged from brief statistics to long narrative reports. Early reports of the Committee on the State of the Church contained few statistics. They analyzed trends of decline or growth and give broad impressions of the spiritual state of the congregations. Not unusual, for example, was the committee’s observation in 1811 that the many churches in Massachusetts were “in a state of derangement and decay”; other dioceses were reported to show “an increase in zeal” and “respect for, and attachment to the church, seems to be growing in several places.”³

¹ Journal of General Convention, 1916, pp. 184-185, p. 371.

² Constitution and Canons, 1958, Canon 5.1, p. 20.

³ Journal, 1811, pp. 275-276.

It is clear that the early reports made no pretense to being emotionally detached from the data. Local information on the state of the Church was understood in providential terms and described with the passion and holistic interpretation of God's revealed presence.⁴ Statistical information improved as the Church became more firmly established, but the reports tended to focus on metrics such as unity, hopefulness, and a profound seriousness of purpose. Reports focused on what was important to the local Church and typically emphasized the observation of the Church's canons and rubrics.

As the nineteenth century progressed, the list of requested parochial information increased. In 1853, parishes were asked to add Sunday Schools, the amount of communion alms, and contributions for missions and parochial schools; in 1874, the Committee requested information about the value of church property and debts, and breakdowns of offerings by intended missionary purpose (chiefly African American and Native American work, home mission, foreign mission).

The added information enabled the Committee to report on unexplored areas of opportunity or neglect, which closely tracked social developments of the era. By the end of the 1880s and 90s, reports resembled sermons, addressing both moral issues and the Church's failure to attend to the unchurched and underserved populations.⁵ The Committee noted Diocesan returns that attested to the establishment of evangelical organizations such as the Brotherhood of St. Andrew, the Church Temperance Society, and other groups devoted to "personal and social purity in the highest and strictest sense."⁶

The 1916 report of the Joint Commission on Business Methods in Church Affairs led to canonical changes that standardized and routinized the process (though not the content) of parochial data gathering. For the first time, blank forms were officially mandated for all parishes and dioceses, and strict deadlines were established.⁷ A canonical amendment in 1937 required tabulation of information separately for each of the triennium's three years.⁸

In keeping with the contemporary invocation of scientific methods to business management, the Committee's reports became increasingly oriented around the evident facts of plain statistics from approximately 1925 forward. The evocative qualitative data of the first 150 years of reporting were replaced with the drier analysis of standard statistical counts, such as membership, budgets, and property value. By 1961, for example, the Committee reported on trends by extrapolating from five years of data (1955-1960) to project trends for ten years out in an "attempt to show the movement and direction of the

⁴ Early statistics and narratives were vivid and summarily indicative of the current state. In 1820, North Carolina informed that they had "hung their harps upon the willows in almost hopeless anguish" due to "the desolation with which [Divine] justice had visited [it]"; in Virginia, "The Almighty continues his gracious smiles to this part of his church." The relatively small size of the antebellum Church allowed bishops an accurate sense of the pockets of growth and decline.

⁵ *Journal*, 1880, p. 360.

⁶ *Journal*, 1886, p. 589. ["The twin monsters of evil which are sapping our homes and people are Intemperance and Impurity" is a sample of the prose style.]

⁷ *Journal*, 1916, pp. 284-285, p. 371.

⁸ *Journal*, 1937, pp. 194-195.

church's life and to project, by scientific means, what the immediate future holds—if the trends remain constant.”⁹

A key twentieth century turning point came when the 1958 Committee lamented the variability of the data it was receiving, while nonetheless asserting the data's potential for telling a great deal about the state of the Church. It recommended creation of a treasurer's manual to improve the local data quality and began working with the headquarters staff of the Unit of Research and Field Study.¹⁰ From this point onward, each Committee generally tapped staff researchers or statisticians to help with design and interpretation. Statistical support moved in 1955 from the Mission Program area's research division to the General Convention Treasurer, and then back to the General Convention Secretary in 1995.

In recent years, interest has increased in identifying ways of documenting “the dynamics of a changing church,” including emerging church trends, non-traditional services, and mission work that brings the congregation into contact with the community.¹¹ The 2003 Committee report echoed the observations of previous and subsequent committees regarding parochial report “issues and limitations” and stated further: “The committee is acutely aware that the parochial reports only begin to give a picture of the ‘state of the church’ as we enter a new millennium.” The missing information included, “what we believe and why we believe,” detailed demographics about members, visitors, and program participants, and the character and effectiveness of congregational ministry.¹² In 2015 the Committee asked: “What if we have been looking at the phenomenology of church life using inadequate and/or inaccurate measures?”¹³

Reasons for Parochial Report Revision

Historically, parochial report forms have been revised for one of four reasons:

1. for housekeeping purposes (e.g., due date, mode of submission, and to improve compliance)
2. to bring them into conformity with changes in the Canons
3. to make them conform to current data gathering trends
4. to collect information relevant to the Church's current needs that was not previously collected or was not collected in the form that it now needed. Since the middle of the last century, revisions to obtain data amenable to statistical analysis have been common.

Although responsibility for the form of the parochial report has been shared since 1958 between the Executive Council and the State of the Church Committee, other Church bodies often requested changes or actively participate in form revision. At one time or another, interim bodies have advocated for proposed changes to the form, notably the Standing Commission on the Structure of the Church, the

⁹ *Journal*, 1961, p. 686. The ten-year analysis warned (incorrectly) of a dire clergy shortage and (correctly) of an apparent trend in a declining rate of new baptized Episcopalians compared to an increased rate of receptions from other churches.

¹⁰ *Journal*, 1958, p. 653.

¹¹ State of the Church Committee. *Blue Book Report*, 2015, p. 71.

¹² State of the Church Committee. *Blue Book Report*, 2003, p. 341-342.

¹³ State of the Church Committee. *Blue Book Report*, 2015, p. 75.

Standing Commission on Evangelism, the Standing Commission on the Church in Small Communities, Executive Council's Committee on Congregations in Ministry, the Committee on the Status of Women, and the Executive Council Committee on Anti-Racism.

Consequently, nearly every triennium brings concrete changes or suggestions for change. Although the way that categories have been defined and tabulated has changed from time to time, certain traditional parochial data elements have persisted: numbers of members, sacramental acts, worship services, finances, property, information about mission work and outreach, and average Sunday attendance.

Presentation and Compliance Issues

A recurring complaint heard by or from the Committee throughout the history of the parochial report is that of inadequate data or confusing presentations. Committee reports recounted typical difficulties: poor compliance by parishes and dioceses, confusing definitions of membership, perceived faults in the forms for not collecting useful data, the unnecessary complexity of the request, and the centralization of data compilation so as to diminish its best local use, whether for statistical analysis or for such purposes as evangelism.¹⁴ In general, the Committee has responded reflexively by revising the forms, creating better instructions, and providing training to improve compliance and reduce complaints.

In the last three decades, the rate of compliance appears to be significantly better than in the past, possibly as the cumulative result of experience combined with expert advice in creating easier forms. Since 1958, most committees have had support from experienced statisticians.¹⁵ A thorough and collaborative review of the forms and the process in 1995, at a time of great intensity in the Church, resulted in 100% compliance from the dioceses (though less than 100% from the parishes). Twenty-first century Committee reports have shown compliance of over 90%.¹⁶

Membership Requirements Affecting the Parochial Report

Historically, a key point of confusion and change in the reports has circled around the various definitions of “member,” “communicant,” “confirmed communicant,” and “communicant in good standing,” that have been used to describe congregants over the years. These changes have been driven largely, although not exclusively, by changes in the canons and attempts to quantify persistent Church members or communicants (as opposed to all baptized members regardless of their continuing affiliation).

The Convention began receiving memorials asking for a clear definition of the term “communicant” in 1934. These requests were not acted on, even after 1952 when the canons were altered to add the phrase “in good standing.” It was not until 1961 that the General Convention added several sections to what was

¹⁴ State of the Church Committee. *Blue Book Report*, 1985, p. 284.

¹⁵ *Journal*, 1958, p. 651, pp. 654-655.

¹⁶ State of the Church Committee. *Blue Book Reports*: 1997, p. 406; 2003, p. 342; 2009, p. 61; 2012, p. 62; 2015, p. 78. Recently reported return rates have been cited as 96% (in 2003); 92% (2009); 94% (2012); 94% (2015).

then Canon 16 (On Regulations Respecting the Laity) defining these terms. A baptized member was defined as a person who was baptized with water and whose baptism was recorded in this Church. A communicant in good standing was defined as a person who was confirmed or received by the Church, and who had received Holy Communion at least three times in the prior year. These definitions were retained until 1982.

The 1982 Convention saw a number of major canonical revisions, many of which centered around confirmation as a prerequisite for full membership in the life of the Church. The canon on Regulations Respecting the Laity (then Canon I.16) was amended to reflect these changes as well.¹⁷ The definition of a baptized member was not changed drastically, adding only a clause that a baptism could occur at any Christian Church (as long as it was recorded by the Episcopal Church). Several changes were made, however, to the definition of communicant.

The amended canon distinguished between communicants above and below the age of sixteen. Further, a communicant was defined as a Church member who had received Holy Communion at least three times during the preceding year. (This was previously the definition of a *communicant in good standing*). However, communicants in good standing were now defined to be communicants, “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.”

In 1985, as part of a larger effort to emphasize the importance of confirmation in Church membership, the Standing Commission on Constitution and Canons recommended major revisions to the Canons. One of these changes was to delete the report on baptized members and communicants in good standing in favor of an elaborate division into the following six categories:

1. the total number of adult baptized members
2. baptized members under sixteen years of age
3. total number of all baptized members
4. total number of confirmed adult communicants in good standing
5. total number of confirmed communicants in good standing under 16 years of age
6. total number of confirmed communicants in good standing¹⁸

In 1997 the total number of confirmed adult communicants was added to replace the term “confirmed,” which was dropped from categories 4 to 6.¹⁹

The House of Deputies Standing Committee on the State of the Church recommended further revisions to this canon to the 2000 General Convention, citing an Executive Council directive to simplify the parochial report. General Convention amended the requirements of Canon I.6.1 to require only the

¹⁷ *Acts of Convention*, 1982-A048.

¹⁸ *Acts of Convention*, 1985-A015.

¹⁹ *Acts of Convention*, 1997-A131.

following information: 1) total number of baptized members; 2) total number of communicants in good standing; and 3) total number of communicants in good standing under the age of sixteen.²⁰

At the 2000 Convention, what currently exists now as Canon I.17 was amended alongside the canon on parochial reports (see above.) Resolution 2000-A104 deleted the phrase defining the general term “communicant,” leaving only the definitions of “baptized member” and “communicant in good standing,” which have been unchanged since their revision in 1982.

The Impact of Change: the Case of Parochial Report Revisions of 1986

The most complete extant documentation illustrating the interrelatedness of the parochial report revision process took place between 1982 and 1993, involves changes in the definitions of “communicant,” and demonstrates with exceptional clarity the sensitivity inherent in the parochial report’s wording and local interpretation.

As noted earlier, changes in the Canons in 1982 and 1985 led to changes in the parochial report forms. All of the changes in the form were vetted through the research support staff, training was provided in the use of the new form, and the form was approved by Executive Council. However, despite careful and thoughtful planning and implementation, the revision netted unanticipated results.

Respondents found the increased number of communicant categories confusing, especially a request to ascertain the number for “active” communicants, a term which was not defined anywhere in the canons or the instructions. This caused respondents to report fewer communicants, leading in turn to membership statistics that showed a significant drop (later described as “precipitous”) for 1986.²¹ The treasurer later wrote: “This difference is significant enough statistically but it is more politically and emotionally significant in the life of the Church. The ripple effect resulted in a consequential refiguring of all the ratios to total Church membership, i.e., the proportion of per member giving, attendance, church school enrollment, etc.”²² Besides the debatable interpretation of the drop in membership, the reporting of baptized members by age category also did not work as expected. The sum of the members over and under age 16 never once in five years matched the total number of members reported.

The Church’s response to the alarming 1986 parochial report results was nearly immediate. In November of 1987 the Executive Council resolved to form a committee to review the parochial report and in 1988 the General Convention directed several of its interim bodies to study the funding of the church at all levels along with the accuracy and importance of parochial and diocesan reports. Council tasked the State

²⁰ *Acts of Convention*, 2000-A104.

²¹ State of the Church Committee. *Blue Book Report*, 2006, p. 49.

²² Memorandum. Treasurer to Ad Hoc Council Review Committee, August 29, 1989, p. 3.

of the Church Committee to work with the Church Center staff on educational workshops to assist in “the current and timely completion of the reports.”²³

As a result, in 1989 the Presiding Bishop appointed an Executive Council Ad Hoc Committee to Review the Parochial and Diocesan Reports. In keeping with the goals set by General Convention, the revisions focused largely on improving compliance, reliability, and accuracy of financial data. The Committee also hoped to find ways to help the Church see the reports, “as contributing to the essential aspects of mission; not just as a ‘tax report’.”²⁴ The Ad Hoc Committee invited input from clergy, parishes, and dioceses, whose questions included: definitions of “household” versus “family;” categories of communicants; and the difficulties of “counting noses” in a mobile society. The Committee reported its recommendations to Executive Council, which approved new and apparently successful forms in 1991.²⁵

The 1986 revision illustrates the impact that untested changes to the parochial report can have on foundational data points such as budgeting, assessments, and program development; changes in the reports, whether adding or deleting elements, can have both immediate and long-term effects. Years later, in an exceptionally detailed report to the General Convention, the 2006 State of the Church Committee noted that the Church’s in-house statistician reviewed past data and “restored certain elements of the annual reports to ensure historic continuity.”²⁶ The Committee stated its belief “that any future changes to the Parochial Report form must be made with care and in close consultation,” and expressed its hope to include “clergy deployment as well as representatives of the various racial, ethnic and age constituencies in the church.”²⁷

Obtaining an Expanded View of the Church Ministries

From as early as mid-twentieth century, State of the Church committees have been concerned that quoting the figures and percentages garnered from the parochial reports did not adequately assess what was really vital about the state of the Church.²⁸ In its 1970 report, the Committee firmly called out the limitation of statistical counts in obtaining an expanded view of ministry.

At a time when the Church was under more than usual stress internally and was also operating in a world marked by extreme division and change, the Committee withdrew altogether from the customary approach when it delivered its brief report. Instead, the Committee deferred to other CCAB bodies to report significant data points, noting that its usual brief summaries of non-statistical information were

²³ Executive Council, Minutes, Nov. 17-20, 1987, pp. 44-45, EXC111987-7; *Acts of Convention*, 1988-A084 and A160.

²⁴ Memo from George McGonigle to Bill Stough and Barry Menuetz, December 15, 1989, AR2010.011.

²⁵ Memorandum, Treasurer to State of the Church Committee, April 28, 1993, p. 4. The anomalous membership figure for 1986 was still being explained in State of the Church reports as late as 2006.

²⁶ State of the Church Committee. *Blue Book Report*, 2006, pp. 48-49.

²⁷ State of the Church Committee. *Blue Book Report*, 2006., p. 60.

²⁸ *Journal*, 1943, p. 548. [“To assess what is transpiring in the life of the Church by quoting figures and percentages is as difficult as ‘to catch the wind and hold it in your hands.’”]

“frequently superficial.” Returning to an earlier tradition of interpretive and thought-provoking commentary, the Committee declared that the Church’s state “is one of confusion, division, and tension.” It questioned both the current purpose of the Committee and what the figures said about the Church’s evangelism, stewardship, use of physical facilities, and forms of worship, and left the statistical report to Journal publication without further interpretation.²⁹

The State of the Church Committee did not issue a narrative report in 1973. In 1976, they requested Executive Council’s input on the forms and procedures to improve the reliability of reporting. Subsequent reports show the beginning of a more consistent interest by the Committee in finding ways to document other critical but less quantifiable elements of church health. In 1979, the Finance Office took the lead in coordinating input to supplement the parochial report data. The Committee later reported the success of this venture by noting, “An intensive survey was made to determine needs for data – demographics, attitudinal research, etc.”³⁰

The value of targeted supplementary data was apparent and led to multiple outcomes, including participation in an ecumenical effort to survey the unchurched in America, a survey relating to the schismatic movement conducted by the Statistical Officer, and a 1979 “Profile of Episcopalians.” The profile effort was repeated in 1981, and in 1996 a “Ministry Census” was conducted as a pilot prototype for a triennial survey of congregational involvement in ministry.³¹ These efforts to acquire broader and different information were conducted outside the parameters of the parochial report.

During the next decade, the State of the Church reports showed the Committee grappling with both the possibilities inherent in asking different questions than in the past and also with the issue of whether such information should be incorporated into the parochial report form. From the mid-1990s onward the Committee dealt with the question of accurately assessing the state of the Church, asking: “Is now the time for this committee to become not just a fact-finding group but a motivational force?” The Committee acknowledged that the parochial report “has really become an assets report.... It does not show ministry and mission information, and needs to do so.” At the time, the Committee decided that the parochial report would not be changed, “but an additional report will be prepared to gather broader information on the ministries and programs of congregations. This will be an every-three-year report, hopefully.”³²

Part of the energy surrounding these efforts to probe more deeply into local ministry activity stemmed from the desire of Church-wide bodies to have readily useful data. However, the 1997 Committee reported that the tabulated data on “other” local ministry (“beyond food pantries”) requested on the

²⁹ *Journal*, 1970, pp. 152-153; *Journal*, 1970, “Statistics for the Triennium 1967-1969,” pp. 664-721.

³⁰ State of the Church Committee. *Blue Book Report*, 1979, p. AA274.

³¹ “Episcopalians: Profile 1979” in State of the Church Committee. *Blue Book Report*, 1979, pp. AA273-282; “Episcopalians: Profile 1982” in *Report*, 1982, pp. AA-316-325; and *Report*, 1997, p. 406 (“Mission Census”), p. 408 (“Ministry Census”), and Appendix C (“Ministry Census”), pp. 434-435.

³² State of the Church Committee, Minutes, October 12, 1995.

parochial report form was not widely used or applied. Because the Committee itself “found an energizing and exciting wealth among the accounts of ministries reported,” it worked with Church Center staff to develop a survey of one-third of the congregations and received a 48% response rate. The Committee concluded: “This plan grew from our absolute conviction that the true state of the church is measured not by crunching numbers but by the ministry of the membership.”³³

Subsequently, such supplementary data has been collected on an ongoing basis, but independently of the parochial report. From 2000 through at least 2014, congregational surveys were conducted every two to three years.³⁴ The surveys explored questions that included detailed demographics (age, gender, race, age, income), size of sanctuaries and the character of worship, practices, programs, ministries, evangelism/recruitment, ordained and lay leadership characteristics, and contact with the community. The supplementary reports appear to have been sponsored and certainly advocated by the DFMS’s Program cluster of offices concerned with strengthening congregations.³⁵

The annual parochial report was designed to use quantitative data measures in evaluating Church growth and contraction. To ask that it also serve a second goal of assessing the qualitative impact of ministry services that are often designed to be unique in local presentation stretched the Church’s capacity for implementing standardized data gathering and analysis in a single survey package.

Summary

The parochial report form in its present state represents decades of development as a tool primarily intended for collecting consistent, basic, structural “hard data” regarding the state of the Church, what the Committee described in its 2015 report as indicators of congregational “viability, such as financial stability and effective administration.”³⁶ The current categories were structured for ease of use and accurate statistical analysis of the traditional units of measure for both short- and long-term purposes.

As of this report, the form has not been adjusted to capture much of the “soft” data that church agencies have been requesting since the late 1970s on what the 2015 Committee report terms “vitality,” defined as a sense of “passion, vibrancy, and a lively response to the dynamic challenges and opportunities of God’s

³³ State of the Church Committee. *Blue Book Report*, 1997, p. 408. A summary of results appears on pages 432-433 of the Blue Book report and a sample form appears on pages 434-435. Resolutions rejected since 2000 include a 2003 proposal to amend Canon I.6.1 to add a new subsection on ethnic representation; a 2006 proposal by the Committee on Education that included requiring adding to the annual Diocesan parochial report the names of young adult Diocesan board members; and a 2009 resolution to include data on the annual energy consumption of all Church properties.

³⁴ The surveys were undertaken mostly, possibly entirely, in conjunction with the Faith Communities Today (FACT) ecumenical/interfaith survey project. At present, all of the reports completed through FACT are available from the “Research Projects and Findings” menu on the FACT website at this page: <https://faithcommunitiestoday.org/>.

³⁵ See for example, C. Kirk Hadaway, “A Report on Episcopal Churches in the United States.” Office of Congregational Development, Domestic and Foreign Missionary Society, The Episcopal Church, April 2002.

³⁶ State of the Church Committee. *Blue Book Report*, 2015, p. 74.

Mission in the...world.”³⁷ It is apparent from the available reports that the State of the Church Committee repeatedly decided against trying to use the parochial report to collect broad categories of information regarding details of parish life beyond the standard units of measurement. More recent documentation of the State of the Church Committee’s work on the parochial report has not been retained for historical study.

It is noteworthy that for approximately twenty years the Church has accumulated a wealth of ancillary data that has been systematically gathered and interpreted for program planning, albeit through other survey instruments that go beyond the parochial report categories. Future work on the parochial report form and supplementary survey tools such as the “vitality index” suggested in the 2015 Committee report have a solid historical foundation on which to build.

³⁷ State of the Church Committee. *Blue Book Report*, 1979, p. AA-269; *Blue Book Report*, 2015, p. 74.