My dear friends,

Welcome to the 51st Annual Convention of the Diocese of Southwest Florida. Jesus said about himself, “I am the light of the world” (John 8:12) and he said to those that believed in him, “You are the light of the world” (Matthew 5:14). Briefly, we see the world truly as it is in the divine presence of Christ Jesus and other people see the world truly through our faithful following of Jesus. That purpose of true vision requires our discipleship responsibility.

We are taught in the Book of Common Prayer that the ministry of the laity is to “…take their place in the life, worship, and governance of the Church.” Priests are “to share with the bishop in the overseeing of the Church.” In the Canons of The Episcopal Church we are informed, “All persons who have received the Sacrament of Holy Baptism…are members thereof.” They continue, “Members sixteen years of age and over are to be considered adult members.” Our diocesan canons stipulate “an elector is a lay communicant member of a Congregation who is sixteen years of age or over…. A qualified elector of the Congregation is entitled to vote in all congregational elections and on all matters that come before the Congregation for a vote.”

There is more Constitutional and Canonical information, but the point is that our responsibility in helping people envision in true light is required and evident. Some more points include these: Congregational annual meetings elect vestries. Vestries, with the consent of the bishop, elect rectors. Vestries, or Congregational Annual Meetings, elect diocesan convention delegates. Delegates elect Standing Committees who advise the bishop and give consent (or not) to episcopal elections. Delegates elect bishops. Delegates elect General Convention Deputies. Deputies, along with the House of Bishops, shape the direction of the Episcopal Church.

It is a required responsibility for Diocesan Convention delegates and clergy to participate in the governance of the Church at Convocations and the Diocesan Annual Convention. This is the polity of the Episcopal Church. And it all starts with Baptism and Annual Congregational meetings!

You are the light of the world. We are here to help the Lord in his ministry. Welcome to Convention.

Faithfully yours,

Dabney T. Smith
Fifth Bishop of Diocese of Southwest Florida
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Welcome to Convention

After our glorious 50th-anniversary celebration last year, we like to think of this as the start of the next 50 years of growth and service in the love of Christ. Thank you for the gift of time and energy that you give to the diocese by participating in convention.

Convention is our annual family reunion, a time for old friends and new to meet and greet. It’s also a time to enjoy socializing and breaking bread together. We know that many of you enjoy going out to dinner, either as a parish delegation or with friends from around the diocese. This year we’ve opened up the schedule. Instead of the Friday-night party, dinner after the opening Eucharist is on your own. That service typically ends by 7 p.m. In the back of this booklet, you’ll find dining options in the vicinity of the Charlotte Harbor Event and Conference Center. Make your reservations early.

Plan to spend some time strolling the conference center concourse and visiting our Ministry Fair. You’ll have a chance to support these ministries with your purchases, pick up information about upcoming events, and network with those with whom you share interests.

We’re pleased to offer you a wide range of workshops this year that meet the needs many of us face in these busy times: how to deal with cybercrime … better communications … learning more about the neighborhood in which you minister. Revive your congregation spiritually by energizing your music program even with limited resources … get involved in the Way of Love … share the How2charist instructed-eucharist video. Hear what our chaplains have to say about meeting the spiritual needs of young people. And much, much more.

Our opening Eucharist at 5 p.m. Friday is always a special time to come together as a diocese in worship. This year we are delighted to bring back Live Hymnal, led by Charles Milling. This versatile band rocked the house in 2012 and we’re thrilled that they’ll be with us again.

At our business meeting on Saturday we’ll hear a “state of the diocese” message from Bishop Smith; we’ll approve the budget; we’ll vote on various resolutions; and we’ll elect new members of diocesan committees, councils and other groups. We’ll also elect deputies to the 80th General Convention of the Episcopal Church in Baltimore, MD, in 2021. Please take time now to read their biographies and think about whom you will vote for to do the work of the diocese in the years ahead.

It will be a busy couple of days! We look forward to spending convention weekend with you.

Judy Stark
Convention Program Chair

Schedule Highlights

Thursday, Oct. 11
1-3 p.m. Standing Committee
3-5 p.m. Diocesan Council
1-5 p.m. Setup for ministry fair, worship, speakers

Friday Oct. 12
Workshops & Eucharist
8 a.m. Registration opens. Continental breakfast.
9 a.m. Morning Prayer
9:30 a.m. Morning workshop
12 noon Lunch
1 p.m. Afternoon workshop
2:30 p.m. Afternoon workshop
4 p.m. Cupcake and fruit cup break
5 p.m. Holy Eucharist

Saturday, Oct. 13
Business Session
8 a.m. Registration opens. Continental breakfast.
9 a.m. Morning Prayer
9:30 a.m. Bishop’s Address
10:30 a.m. Convention Business Session
Friday Agenda & Details

Fifty First Annual Convention

Registration Opens with Continental Breakfast .................................................................................................. 8 – 8:50 a.m.
Quiet Time before Morning Prayer ..................................................................................................................... 8:50 – 9 a.m.
Morning Prayer .............................................................................................................................................................9 – 9:30 a.m.
Morning Workshop Session ..........................................................................................................................................9:30 – Noon

Lunch on the Riverwalk. Bring tickets to buffet lines.

Afternoon Workshop Session ......................................................................................................................................1 to 2:30 p.m.
Afternoon Workshop Session ...................................................................................................................................... 2:45 - 4 p.m.

Cupcake and Fruit Cup Break

Clergy & Acolyte Vesting ..........................................................................................................................................4:30 p.m.
Holy Eucharist ................................................................................................................................................................5 p.m.
Dinner On Your Own ...................................................................................................................................................7 p.m.

On-Site Registration Pick-Up Process

- Locate the registration tables on the concourse of the conference center.
- Registration for Friday is alphabetically organized, by last name, from A – Z. There is no designation for clergy, lay delegate/alternate and guests/visitors
- You will be handed your name tag and your ticket for lunch if this has been pre-ordered. Unfortunately, no additional lunch tickets will be available at convention.
- Once you have picked up your materials, you may help yourself to the continental breakfast, visit the Ministry Fair tables, locate your first workshop room and attend Morning Prayer.

Friday Workshops

A full day of workshops dedicated to continuing education on a wide variety of interesting topics is open to anyone - convention delegate/alternate, clergy and guests/visitors. You must register in advance so that adequate provisions are made for seating and handout material.

This is your opportunity to learn new skills and find resources you can take back to your congregation. The canonically required safeguarding training is offered annually. Registration forms can be downloaded from the convention page of the diocesan website. These are also included in the convention packets that were mailed to all official voters.
Our Ministry Fair, on the main concourse, shows off the breadth and depth of ministry in our diocese with displays from congregations, ministry groups, national organizations and businesses that specialize in church products and services.

There are shopping opportunities here as well as opportunities to contribute to Episcopal charitable causes, and there are always surprises.

Don't forget to visit our very popular Altar Guild booth, where congregations offer vestments and equipment they no longer need at no charge.

Opens Friday at 8:30 a.m. and closes after lunch on Saturday. Fair participants include:

- Way of Love
- Diocesan Altar Guild Free Market
- Lifetouch
- Justice Ministry in Southwest Florida
- Church of the Redeemer Gift Shop
- Westminster Communities
- Bishop Gray Retirement Foundation
- Amazing Love Healing Ministries
- All God’s Creatures Animal Ministry (Iona-Hope)
- Union of Black Episcopalians
- Episcopal Relief and Development
- Cornerstone Kids
- Clergy Spouse Association
- Women’s Ministries (ECW, DOK, CPC, UTO)
- Cursillo
- St. Anne’s Promise
- Verdin Company
- DaySpring Episcopal Center
- Sewanee, University of the South
- Wesley Chapel Episcopal Church
- Our Little Roses
- Hispanic/Latino Ministries
- School for Ministry
- Wear a Prayer
- St. Margaret of Scotland
- Dominican Development Group
- Companion Diocese Committee
- Nancy L. Hurley, author
Diocese Gathers for Worship

Our Friday Eucharist is the highlight of convention. This Rite II service includes our vested priests and deacons, as well as leadership from across the diocese.

The service, which includes the processing of diocesan clergy, is always a logistical feat. Assisting in the gathering are the volunteers from Diocesan Altar Guild, Cathedral Vergers, ushers from Good Shepherd Punta Gorda, and acolytes from across the diocese, as well as dozens of others. A special offering will be collected.

The service will begin at 5 p.m. This year we are delighted to bring back Live Hymnal, led by Charles Milling. This versatile Florida band specializes in new arrangements of our traditional Episcopal hymns, and we are thrilled to have them back.

Friday morning, the Rev. Thomas Williams will lead hymns on piano with violinist Neal Ward. On Saturday, Cathedral organist Dwight Thomas will lead hymns on piano.
3A. Healing as Mission

What does healing as mission mean? It means taking the healing power of Christ to the public square. It means your church becomes known as a healing church. Healing as mission is an outward action of our faith that God heals today; that He can transform us, making us new creations. We are not stuck where we are. Healing as mission brings hope to the hurting not just in our church but outside our churches. Jesus is alive! Dare to believe... Come and learn what healing as mission might look like in your church and come encounter Jesus the Healer as we gather as one seeking Him. “When Jesus had called the Twelve together, he gave them power and authority to drive out all demons and to cure diseases, and he sent them out to proclaim the kingdom of God and to heal the sick” (Luke 9:1-2 NIV).

Presenters: The Rev. Dr. Sharon L. Lewis is the founder and executive director of Amazing Love Healing Ministry. She served as rector of Church of the Holy Spirit, Osprey, for 15 years. She has worked in healing ministry for 25+ years and as a chaplain for the Order of St. Luke.

The Rev. Jim Hedman is rector at St. Mary Magdalene Episcopal Church in Lakewood Ranch. He is a graduate of the Episcopal Seminary of the Southwest.

2A. The Way of Love

The Way of Love is an intentional commitment to a set of seven spiritual practices that help us to create a Jesus-centered life. Introduced by Presiding Bishop Michael Curry at the General Convention in 2018, the Way of Love invites us to turn, learn, pray, worship, bless, go, and rest. Learn about this rule of life: how you can adopt it personally, and how your small group, class, or congregation can participate. Discover the rich resources — print, video, podcast, blog, newsletter — that The Episcopal Church makes available at no charge. “Follow Jesus and change the world,” Bishop Curry says. Come discover the Way of Love.

Presenter: Sandy Milien is co-host of the Way of Love podcasts, in which Presiding Bishop Michael Curry guides us along the Way of Love. She is missioner for community engagement and assistant to the bishop in the Diocese of Bethlehem.

4A. Sing to Jesus! Tuning Up Your Music Program with Limited Resources

This workshop – intended for choirmasters, organists, music leadership, singers, and interested laity – will focus on strategies and practices that can transform parish music programs, even in the face of limited means, budgets, and talent. The fewer resources you have, the more important it is to unleash and rely on your creativity. The workshop will focus on a series of step-by-step objectives that respond to pragmatic needs of musicians, planners, and leadership, all the while keeping a focus on artfulness and vitality of...
expression. The presentation will be interactive and will include demonstration, participation, and dialogue. We’ll offer tips on inexpensive or free resources. Be ready to share what worked (or didn’t) in your congregation and how you’ve worked with children, with little money, or with few people. Bring your hymnal and be prepared to sing!

Presenter: Haig Mardirosian is dean emeritus, College of Arts and Letters, at the University of Tampa; professor of music emeritus, American University, Washington, DC; and recitalist, conductor, composer, and church musician.

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**AFTERNOON SESSION**

**1:00 – 2:30 pm Workshops**

**B1. Taming the Communications Dragon**

In spite of the ease of technology, our parish communications have become more and more complex. What was once a simple task to inform potential attendees about an event or worship service with a mailed card or parish bulletin now requires posting on Instagram, Facebook, and website; newsletter, printed mail fliers, email, Facebook video, offertory announcements and text messaging apps. These time-consuming efforts can overwhelm even the most seasoned communicator.

We will explore each of these options and show ways we can all share information better, and promote our events to current parishioners and future audiences. We will unveil a new tool for this effort, an updated Brand Guidelines and Stylebook. In the past this has been essentially a glossary of terms. We are expanding it to show ways we can not only communicate better, but emphasize the positive aspects and enduring (and sometimes antique) charisms of the Episcopal Church in a new modern era. We will also unveil an online diocesan resource page for all of these promotional elements, all of this the result of a recent diocesan communications survey. We will also set aside time to hear from parishes on their marketing needs.

*Presenter: Garland Pollard, Diocesan Communications Director*

**B2. Perspectives on Cybersecurity**

Cyber threats have practically exploded in our daily lives – phishing emails impersonating our colleagues, fraudulent use of our credit cards, calls demanding payment where we don’t really think anything is due. “Bad actors” using more sophisticated technical abilities are harder to spot. The damage they cause can significantly harm our churches and individual members, and therefore Cyber security is becoming a household topic. This workshop will give you an awareness of the threats and the tools to have at hand when (not if) the time comes. A panel of our diocesan financial services partners will offer their perspectives and tips for identifying and managing the risk of the growing cyber security threats of our world today.

*Presenters: Canon Anne Vickers and the Rev. Martha Goodwill will moderate a panel of our diocesan partners, including: Maureen Hegarty (banking perspective) from Iberia Bank; Mary Brown, CPA (auditor perspective) from PDR CPAs; Steve Follos and Paul Stephens from Church Insurance and NAS (insurance and breach response provider perspective).*

**B3. Using MissionInsite to Engage Your Community: Who Are We? Who Are Our Neighbors?**

“When you understand the households in your community, ministries are better focused and more relevant!” This workshop will focus on ways that congregations can discover more about themselves and their community. We will illustrate how MissionInsite will assist in answering essential ministry questions such as:

- What is our Ministry Area?
- Are the households of our congregation similar to or different from the households in our mission area?
- What are the opportunities and challenges we will discover as we seek to engage the people around our church – our neighbors?
- What is our church’s financial potential?

MissionInsite is an integrated suite of information and query tools that produce custom reports on demographics and psychographics of a community. Through a diocesan license, this web-based software is available to our congregations at no cost. Vestries engaging this tool have earned a greater understanding of their members and significantly more confidence to implement new ministries.

*Presenter: The Rev. Chuck Salter, president of MissionInsite*
**B4. How2charist: An Instructed Eucharist —Part 1**

The Holy Eucharist is the center of our worship, but the exact meaning of the words, the gestures and the vessels used and the vestments worn by the celebrant remains a mystery to many of us.


We’ll have time for questions and answers.

Then stay for Part 2 (see below) in which we’ll talk about how to use this free resource (video and supplemental materials) in our congregations.

**Presenters:** Sarah Hill is directress, diocesan Altar Guild. The Rev. Canon Katie Churchwell is canon for community formation, Cathedral Church of St. Peter.

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**AFTERNOON SESSION:**

2:45 to 4 p.m.

**C1. Beyond the Grant Distribution: Catalytic Impacts in Southwest Florida**

The diocese has several grant sources to support congregation growth. Whether sourced by endowments, budget surplus, or even the Bishop’s Convention Address and call to action, $250,000 per year has been distributed from the diocesan budget annually in response to well-articulated ideas for ministry.

Learning from each other is key, and being a catalyst for further inspired ideas is a part of the process. In this workshop, moderated by Canon Anne Vickers and Archdeacon Kathleen Moore, we’ll hear a variety of stories from your peers who are excited to share their experiences.

Specifically, what did you learn? What further action did it spark? Join us for conversation, networking and links to applying for your congregation grant this fall.

**Presenters:** Canon Anne Vickers is Canon for Finance and Administration; Archdeacon Kathleen Moore leads the Council on Deacons who administer the Episcopal Charities grant awards.

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**See Previous Conventions**

Pictured here from 2018, the Rev. Eric Cooter and the group from St. Monica, Naples including Tom Cote, Matt Devlin and Suzanne Bodley. You can find information about previous conventions online:

episcopalswfl.org/convention.html

Photos and videos are also online:

**Photos:**
Flickr.com/episcopalflorida

**Video:**
Vimeo.com/episcopalflorida
C2. Family Ministry: Including Children in Church Life

Are you looking for practical steps and inspiration for developing family and intergenerational ministry in your congregation? Guest speaker Annette Johnson has worked professionally in children’s and family ministry since 2008 and currently serves as the director of Children and Family Ministries at First United Methodist Church, Gainesville. Annette has a passion for serving the entire family and integrating children into the everyday life of the church. Please join us and take important steps for development back to your congregation.

Presenter: Annette Johnson, director of Children and Family Ministries at First United Methodist, Gainesville.

C3. How2charist: An Instructed Eucharist — Part 2

Now that you’ve seen the video How2Charist: Digital Instructed Eucharist — which is available at no charge — how can you use it in your congregation? We’ll talk about ways it can be used in confirmation and reception preparation classes; as a refresher for longtime members and an introduction for those new to the Episcopal faith; and how to tailor it to youth and adult formation classes, members of the Altar Guild and those who serve on the altar. Help your congregation enter into the mystery and ignite or renew passion and excitement for the sacrament of the Holy Eucharist.

Presenters: Sarah Hill is directress, diocesan Altar Guild. The Rev. Canon Katie Churchwell is canon for community formation, Cathedral Church of St. Peter.

C4. What the Chaplains Know — That We Need to Know

The chaplains at our local prep schools, colleges and universities minister to congregations in the hundreds and even the thousands – far more than many of our churches.

And that’s just the students: They also offer spiritual guidance to faculty, staff, and families.

Let’s listen to the people who are on the front lines of ministry serving the young people who are seeking a spiritual home, even if they can’t name it as such.

What do they want, what are they seeking, what do they respond to? The chaplains will share valuable insights that will impact and clarify perceptions about ministry to children, youth, families, and emerging adults, and how congregations can support the chaplains as they go about their vital work.

Presenters: The Rev. Adrienne R. Hymes is resident chaplain and director at St. Anselm’s Episcopal Chapel Center at USF and diocesan Missioner for Church Extension. The Rev. Michael Todd, center, is chaplain at the State College of Florida Manatee-Sarasota and rector, Church of the Holy Spirit, Osprey. The Rev. Rich Clark, at top, is chaplain at Saint Stephen’s Episcopal School in Bradenton.

Workshops Free to Diocese

A reminder: You do not have to be a delegate to attend convention.

Many from the diocese choose to attend learning workshops on Friday and then stay for our Holy Eucharist Friday night. This is an excellent way to become involved in the wider life of the diocese. There is no cost to attend workshops, but we do ask that you register. Lunch is also available as well; registration and payment forms are available online at our diocesan website episcopalswfl.org.
Saturday Convention Agenda

Fifty First Annual Convention
Diocese of Southwest Florida

Registration and Coffee ................................................................. 8 – 8:50 a.m.
Quiet Time before Morning Prayer ................................................................. 8:50 – 9 a.m.
Morning Prayer, Rite II: The Rt. Rev. Barry Howe, Officiant ................................................................. 9 – 9:30 a.m.
Bishop’s Address ................................................................................. 9:30 – 10:15 a.m.
First Business Session ................................................................. 10:30 – 11:30 a.m.

1. Introduction of Visiting Dignitaries ................................................. The Rt. Rev. Dabney Smith
2. Appointments for Convention ......................................................... The Rt. Rev. Dabney Smith
4. Introduction of New Canonically Resident Clergy ......................... The Rev. Canon Richard Norman
5. Introduction of Non-Canonically Resident Clergy ......................... The Rev. Canon Richard Norman
7. Report of the Committee on Dispatch of Business ......................... The Rev. Adrienne Hymes
9. First Ballot ....................................................................................... The Rev. Canon Richard Norman

Break

10. Voice Vote Confirmation/Deanery Reps to Diocesan Council ......... The Rev. Adrienne Hymes
11. Bishop Appoints and Convention Confirms ..................................... The Rev. Adrienne Hymes
12. Bishop’s Appointees ....................................................................... The Rt. Rev. Dabney Smith
15. Necrology ......................................................................................... The Rev. David F. Wyly

Lunch 12:30 to 1:15 p.m.

17. Report of the Treasurer and Budget Presentation ......................... Canon Anne Vickers, CFO
21. Third Ballot ..................................................................................... The Rev. Canon Richard Norman
23. Other Resolutions (if necessary) ....................................................... Mr. Gregory Hearing, Esq.
24. Courtesy Resolutions ..................................................................... Mr. Gregory Hearing, Esq.
25. Report of Vote (if necessary) ............................................................. The Rev. Canon Richard Norman
Saturday Convention Details

On-Site Registration Pick-Up Process

The annual business meeting of the diocese requires a separate registration process from Friday. We do this to differentiate “members of convention” (lay and clergy voting delegates) from all other attendees.

- Locate the registration table in the concourse of the conference center that corresponds to your standing as an attendee. The choices will be clergy/clergy spouse/lay delegate/lay alternate/guests/visitors. Each category will be sub-sectioned alphabetically (A-J, K-N, and so on) by last name. Make certain you are at the correct table category and in the correct line alphabetically.
- You will be handed your nametag and where applicable, a voter packet.
- You will be handed your lunch tickets for Saturday (No additional lunch tickets will be sold or available at convention).
- Once you are registered, proceed to the floor of convention in Hibiscus Hall. Locate your designated seating area/deanery. Convention Pages will be assigned to each deanery and can help you find your table.

Credentials and seating at the business meeting

At the meeting, seating is designated as follows:

- Voting members of convention sit at designated tables at the front of the hall labeled by deanery and congregation.
- Retired clergy, who retain seat and voice, sit at tables specifically designated for them. They do not sit with their former or current congregations.
- Tables marked “Special Guests” are set aside for members of Standing Committee, Diocesan Council, Finance Committee, Endowment Board, Chancellor and Vice Chancellors, Chaplains to Retired Clergy and Families, Honorary Members of Convention, Visiting Bishops and other designated Special Guests.
- All others are seated in the designated guest gallery. These include, but are not limited to, lay alternates; non-canonically resident clergy; clergy spouses; and anyone else wishing to attend this annual business meeting of the Diocese of Southwest Florida.
Details for Delegates

Delegate Requirements

Chances are you were elected as a convention delegate at your congregation’s annual meeting or you were appointed by your vestry or bishop’s committee. To be a delegate, you must satisfy the same qualifications that apply to an “elector” or voting member of a parish:

1) at least 16 years of age
2) name is duly enrolled in the register of your congregation
3) regular in attendance at divine services
4) make stated contributions of record to the general support of the congregation

If your congregation is a parish, you are one of three lay delegates. If your congregation is a mission, you have two delegates. Each congregation also has an alternate delegate in case a delegate is unable to serve. Clergy members of the convention have separate rules under the Constitution and Canons of the Diocese.

The Budget

- Copies of the budget are in this booklet
- Chief Financial Officer, Canon Anne Vickers, will present and explain the details of the budget at deanery convocations. The budget as well as other financial topics are included in the Report of the Treasurer at the Saturday business session.

Resolutions

Throughout the year, resolutions are submitted seeking approval of the members of convention on a variety of topics. In the past, resolutions have included support for farm workers in Immokalee, revising or amending diocesan Canons, making changes in our financial procedures and granting voting rights to deacons.

The text of the resolutions and explanations of what they would do is available on the diocesan website and in the convention book that you receive at your fall deanery convocation. Read the resolutions and the explanations, think about them, ask questions and determine how you plan to vote. Don’t wait until the morning of convention to start considering whether you will support one resolution or another.
Business Session Tips

- **Pages:** As you enter Hibiscus Hall, a Floor Manager and Convention Pages will be on hand to direct you to your assigned seating area. We do this to ensure that only those who are entitled to vote are seated on the voting floor of convention.
- **Speaking:** Once the business meeting has begun, if you wish to speak at an appropriate time, please approach one of the two microphones on the convention floor and wait to be recognized by the chair. First state your name and congregation, and then make your comments, which are limited to three minutes. Then return to your seat. Convention works through the agenda, with scheduled breaks and a lunch period.
- **Elections:** Votes will be taken throughout the day on a variety of issues. For some votes, you will fill in a printed ballot and hand it to an assigned page, who will then carry the ballots to the tellers to be counted electronically.
- **Red/Green:** Other votes may be taken by a show of red or green cards, which you will receive in your voter packet, along with other official materials. At the appropriate time, hold up red for “No” and green for “Yes.” The floor pages will count the cards. We believe this is a more accurate system than a voice vote.

Changing from Alternate to Delegate

Delegates who know in advance of convention weekend that they will be unable to attend may arrange to have their congregation’s alternate changed to full delegate status. The change of delegation form is on the convention page of the diocesan website (found under the “Governance” tab on the “Home” page) along with all the other convention registration materials. This form must be completed and signed by the rector/vicar/priest-in-charge and senior warden or secretary of the vestry, and mailed to the Rev. Canon Richard Norman at the diocese and received no later than close of business on Thursday, Oct. 3, 2019.

For delegate changes on the day of convention (Saturday only), alternates and their rector, vicar, priest-in-charge or interim must visit the credentials room located behind the registration tables. The clergy member must sign the change form. If no clergy member from the congregation is present, the Chair of the Credentials Committee will verify and sign the change form.

At that point, the alternate’s nametag will be updated and the alternate will receive a voter packet and will be seated at the congregation’s table on the floor of convention.

Delegate changes are only permitted prior to the presentation of the final Credentials report (usually this comes about at approximately 10 a.m. on Saturday). After that time no changes in delegate/delegation status may be made.

Once you have picked up your nametag and voter packet, you are officially registered and you alone are responsible for your personal convention materials and ballots. No duplicate materials will be handed out.

We begin with registration at 8 a.m. followed by Morning Prayer at 9 a.m. and the business session at 9:30 a.m.

You are invited to enjoy a continental breakfast and visit the Ministry Fair in the concourse before you enter the floor of convention in Hibiscus Hall.
Election Nominees

Election A:
Standing Committee, Lay
Elect two lay persons to a three-year term

Mr. Philip K. Beauchamp
Good Shepherd, Dunedin

Biography: I am the son of an Episcopal priest having grown up in a small New England parish. The Episcopal Church and my church family have always been central to my life. Carol, my wife, is a native Floridian and grew up at Calvary, Indian Rocks Beach. My wife and her sister Cindy were the first female acolytes in the Diocese of Southwest Florida. I have resided in Florida for the past 34 years and have been previously a member of Calvary, St. Boniface in Sarasota, and All Saints, Tarpon Springs.

Nominee Statement: At the Southwest Florida diocesan level, I have served on the DaySpring Development Committee since its inception. Our efforts have been to develop a vision and strategic plan for DaySpring including the successful relocation of the diocesan office to DaySpring several years ago. At the parish level, I have been junior warden, treasurer, and vestry member. I am currently a vestry member at Church of the Good Shepherd, Dunedin. I have also served as the chairman of the Calvary Endowment Committee. Carol is a eucharistic minister and former senior warden. In 2008, I retired from a successful 40-year career as a hospital and health system CEO. My last effort at Morton Plant Mease was to merge these hospitals and to create the Baycare health system, the largest health system in Tampa Bay. Since then, I have been engaged in national healthcare consulting, most notably with a number of Catholic hospitals across the United States. I have served on a number of significant community non-profit boards of directors and continue to do so at present. Carol and I have four married daughters and 13 grandchildren.

Ms. Jacqueline Smith (Jackie)
St. John, Clearwater

Biography: I was born and raised in Cleveland, Ohio. I was married and had two girls. They have had five children between them, and I have a great grandson, as well. I worked for the City of Cleveland as a truck driver I was the first female truck driver in the department. I worked my way up though the ranks from truck driver to Assistant Manager of Park Maintenance. We maintained city parks, public properties including vacant lots and house. I retired in 2012 and moved to Florida. I became an Episcopalian in 1980 and have been active in the church ever since. In Cleveland I was an usher, Sunday school teacher, choir mom, altar guild, breakfast coordinator, chalice minister, vestry member, adult youth leader (local and diocesan level), and a member of the Commission for Racial Understanding (diocesan level), EYE adult youth leader (national level), also a member and past chairman of the S.T.A.R.T. Board (Support to At Risk Teens) and in the diaconate program. Since I moved to Florida, I have served as AIDS Partnership Dinner Coordinator (volunteer), volunteer for Empath Health daily, a member of Faith in Action Strength Together (FAST is a justice ministry), attended Cursillo, chalice minister, Eucharistic visitor, and worked with the acolytes. I have become a Daughter of the King chapter president and now serve as VP of the diocese. I served on the vestry as the junior warden (2015-17) and during my tenure, I supervised our parish hall renovation, led the clean up after Irma and helped file insurance claims and follow-up repairs after a break-in. I am serving on vestry as the junior warden again. I enjoy playing pinochle, traveling and going out dancing.

Mr. Duane A. Hollier
St. Martin, Hudson

Biography: I was born in Tulsa, Oklahoma. I have been married to my wife, Beverly for forty-six years. We have two children, Duane II, and Ebony. I attended Tuskegee University where I received my Bachelor of Science in Biology and Chemistry, Meharry Medical College, where I received my Radiologic Technology Certification, and Vanderbilt University where I received my Nuclear Medicine Technology Certification. I am currently the Radiation Safety Officer and Supervisor of Nuclear Medicine at Medical Center of Trinity located in Trinity, Florida. I am currently the President of the Southeastern Chapter of the Society of Nuclear Medicine Molecular Imaging Technologists and past Treasurer. I am a past President, Vice President, and Treasurer of the Florida Nuclear Medicine Technologists. I am a two time recipient of the HCA Frist Humanitarian Award, and the Kathy Kelleher Merit Award. I attend St. Martin's Episcopal Church and have been actively involved at all levels. I have served on the Vestry two terms. I currently serve as the Senior Warden. Other positions that I have held include: Treasurer, Eucharist Minister, Finance and Audit Committees. I also am a faithful member of the choir.

Nominee Statement: I have a good working knowledge of church structure and polity. I have an acute awareness of and an interest in issues facing the Episcopal Church. I believe I have the diversity of experience, time and desire to contribute to the betterment of the Diocese of Southwest Florida. Since the Standing Committee is so important to the work of the Diocese and the assistance to the Bishop. I hope to be a valued member of the Standing Committee.

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Ms. Jacqueline Smith (Jackie)
St. John, Clearwater

Biography: I was born and raised in Cleveland, Ohio. I was married and had two girls. They have had five children between them, and I have a great grandson, as well. I worked for the City of Cleveland as a truck driver I was the first female truck driver in the department. I worked my way up though the ranks from truck driver to Assistant Manager of Park Maintenance. We maintained city parks, public properties including vacant lots and house. I retired in 2012 and moved to Florida. I became an Episcopalian in 1980 and have been active in the church ever since. In Cleveland I was an usher, Sunday school teacher, choir mom, altar guild, breakfast coordinator, chalice minister, vestry member, adult youth leader (local and diocesan level), and a member of the Commission for Racial Understanding (diocesan level), EYE adult youth leader (national level), also a member and past chairman of the S.T.A.R.T. Board (Support to At Risk Teens) and in the diaconate program. Since I moved to Florida, I have served as AIDS Partnership Dinner Coordinator (volunteer), volunteer for Empath Health daily, a member of Faith in Action Strength Together (FAST is a justice ministry), attended Cursillo, chalice minister, Eucharistic visitor, and worked with the acolytes. I have become a Daughter of the King chapter president and now serve as VP of the diocese. I served on the vestry as the junior warden (2015-17) and during my tenure, I supervised our parish hall renovation, led the clean up after Irma and helped file insurance claims and follow-up repairs after a break-in. I am serving on vestry as the junior warden again. I enjoy playing pinochle, traveling and going out dancing.
Nominee Statement: I am always willing to raise my hand and say, “Here I am Lord.” I would like the opportunity to serve on the Standing Committee, working with Bishop Smith and the committee to address and advise regarding any issues facing the church today. I will contribute to a positive solution by listening to all sides of each issue, seeking consensus if there is one or alternatives, if there is not. I would be honored to serve the Diocese with prayer, dedication, hard work and creativity while taking confidentiality very seriously. Thank you so much for your consideration.

Mr. Ray U. Stoll
St. John, Tampa

Biography: Certified Structure Settlement Consultant with National Financial Partners and CEO of private consulting firms Stoll Settlement Services, Inc. and Stoll & Son Settlement Services, Inc., as well as past CEO of Settlement Source, Inc. The first is dedicated to legal consultation and “expert witness testimony” primarily on extra contractual/bad faith insurance issues, et al. The second is on structured settlement related issues and “expert witness testimony” as an annuity specialist. Co-authored two books and have written numerous articles for various insurance trade journals and legal publications. Graduated from Misawa High School at Misawa AFB, Japan, and North Texas State University with degrees in Political Science/Pre-Law. Attended University of Baltimore School of Law and received above referenced CSSC designation from The University of Notre Dame in South Bend. Also hold a CPCU designation (Chartered Property & Casualty Underwriter.) Worked as Regional Claim Manager for both INA/CIGNA and Hartford Insurance Companies, then Vice President of Claims for Progressive Insurance before going into my present roles.

Nominee Statement: I have served since 2016 on the Standing Committee, having been Recording Secretary my second year and Vice President my third year (presently.) I also served as Liaison to the Commission on Ministry (COM) in 2017-18. I presently serve on the Diocesan Risk Management Committee. Volunteer as a Lay Reader and Eucharistic Visitor at St. John’s, helped found the Men’s Interactive Bible Study group 14 years ago, and served as Charter Board member and insurance/legal advisor for Family Promise of Hillsborough County, an ecumenical Christian outreach for homeless families. Also serve as Cursillo Parish Rep for St. John’s. Served on Cursillo Secretariat for Diocese from 2013-2015 and served as Rector for Cursillo Weekend #129 in February 2015 and Cursillo #141 in February 2019 at DaySpring, becoming the first in our Diocese to repeat as Rector.

The Rev. A. Charles Cannon III
St. Hilary, Ft. Myers

Biography: By way of introduction I am a life-long Episcopalian, the son of a priest and seeking an opportunity to serve this Diocese as a priest on the Standing Committee. I am the father of two fine young adults who have both “left the nest.” I have lived as a man divorced from their mother for 10 years. I have been able to reconcile with my former wife, several years after the divorce, practicing what I preach every week: the astounding love and forgiveness of God. As the son of a priest I was baptized, confirmed and have lived the life of a lay person and ordained. I have lived and served in 8 dioceses including 3 in Florida. Between age 7-40, I served as a faithful member of the Episcopal laity: at the altar as an acolyte, as a lay reader, as an Eucharistic Minister, as Sunday school teacher, as a vestry member and as Junior Warden. God called me into Holy Orders in 1992; enrolling in the Diocesan School for Ministry in Southeast Florida in 1994. I was ordained Deacon in 1998. My thirteen year diaconate was filled with opportunities to serve teenaged runaways, the poor and the disenfranchised in Palm Beach County before being called to seminary and the priesthood in 2008.

Nominee Statement: I am currently serving at Saint Hilary’s Episcopal Church where I have been Rector since January 2014. One focus of my ministry has been to become involved in the work of the Diocese. After being ordained a deacon in 1998 in Southeast Florida, I served on the Council of Deacons, the Teenage Runaway Hotline and served the poor and hungry through Saint George’s Soup Kitchen in Riviera Beach. I was ordained priest in June 2011 after attending and graduating from the School of Theology at Sewanee. In the Florida Keys I continued the path of serving the diocese. I used skills that I learned prior to receiving Holy Orders including: clinical social worker, social media & information technology and family therapy. Before my priestly ordination I also served as director of a teenage runaway shelter. Now by God’s Grace I have served as a priest for 8 years. As a priest in Southwest Florida I have served the parish and Diocese in the many ways: as chaplain to FGCU in Estero for 4 years, as Fort Myers’ clergy representative on Diocesan Council for 5 years, as the appointed Dean of Fort Myers Deanery by the Bishop for 3 years, on the Diocesan Endowment Committee for 2 years, as a member of the Constitutions and Canons revision committee for 1 year, and as an assistant spiritual director for Cursillo #141. Today I am seeking the Convention’s support and endorsement of my candidacy as clergy member of the Standing Committee.
The Rev. Bryan D. O’Carroll
Holy Innocents, Valrico


**Nominee’s Statement:** I have actively served this diocese first as a lay person and now as priest for a combined 20 years. Having effectively served in many diverse leadership positions, it is my hope to bring these experiences and knowledge to this important role. When serving God’s Church it is always my desire to live into Paul’s words that “Rather, speaking the truth in love, we are to grow up in every way into him who is the head, into Christ (Eph.4:15).” It would be my privilege to serve our diocese in this capacity as we continually strive to maintain our unity and diversity as followers of Jesus.

The Rev. Ryan R. Whitley
St. Thomas, St. Petersburg

**Biography:** I was born and raised in this Diocese. From early on, I grew to take seriously my relationship with Jesus Christ and accepted my call to ordained ministry here at an early age. After graduating from Wake Forest University and Seabury-Western Theological Seminary, I was called to serve as Curate at St. Mark’s Church in Carrollwood, Tampa. After three and a half years there, I accepted the call to serve as Rector of St. George’s, Ardmore, PA, a position I held for almost eight years. In 2017, I was elected the next Rector of St. Thomas’ Episcopal Church in St. Petersburg, FL and joyously returned to my home state and diocese. I am married to Elise Woodroffe Whitley (this year we celebrated ten years of marriage) and together we are the proud parents of two children, Jackson, (8) and Caroline (5), in addition to one unruly rescue mutt.

**Nominee Statement:** I have served in many capacities throughout the church, primarily in Pennsylvania that well prepare me for service on the Standing Committee. I have a keen grasp on Episcopal polity, doctrine, and worship, and would look forward to the honor of serving in an advisory capacity to our Bishop. God, through the Holy Spirit, calls us each to our various ministries based upon the gifts we have received through God’s grace. I believe that God is calling me now to greater Diocesan responsibilities and I look forward to the opportunity to stand for election to the Standing Committee. I have many gifts for leadership, and have put those to use in the church in many and varied ways, from serving on Diocesan Council, to being the Ecumenical and Interreligious Officer, from chairing Convention in the Diocese of PA for three years, to serving as a faculty member for Fresh Start. As a council of advice for the Bishop, the Standing Committee is a major responsibility and one I will take seriously. As a career clergyperson, I bring a deep understanding of, and experience with, how the church functions. As a younger clergyperson, I will be in the church, God willing, for many years to come and would regard any responsibility to shape its future with great faithfulness.

**Election C:**
Diocesan Council, Lay

**Mrs. B.J. Webb Bishop**
All Angels, Longboat Key

**Biography:** BJ Webb Bishop is the former Senior Warden of All Angels by the Sea in Longboat Key. Prior to living in Longboat, she lived in Leesburg, Va., where she served on the Vestry of St. James Episcopal Church and attended St. James since childhood. Her professional life was spent in legislative work, real estate and in elected office as a Planning Commissioner, Council Member, Vice Mayor and Mayor of Leesburg. She continues to serve in public office as the Chair of the Planning and Zoning Board of Longboat Key. Mrs. Bishop is married and the mother of two grown sons and four grand-daughters. She has been an active volunteer in her communities serving on numerous boards including the United States Tennis Association, The Loudoun Chapters of the American Cancer Society and Red Cross as well as a trustee for the Westmoreland Davis Foundation.

**Nominee Statement:** Mrs. Bishop began attending All Angels by the Sea as a snowbird in 2003. In 2010 she was asked to edit the newsletter for All Angels and also took an active interest in helping with the gardens and landscaping. In 2011 Mrs. Bishop was asked to fill an expired term on the Vestry of All Angels.

She was asked to serve as Senior Warden from 2013-18. She, with her talented Jr. Warden, Bob Erker, were responsible for the gardens and grounds of All Angels. She stepped in to handle administrative tasks during the rector’s absence due to illness. She has been involved in drafting job descriptions for administrative staff, as well as interviewing and hiring. She serves on the Endowment Committee, Finance Committee, Columbarium Committee, Outreach Committee and the Investment Subcommittee of the Endowment Fund. She has written a history of All Angels Church - background which was used for a recent article in the Diocesan Magazine. She chaired the effort of selecting a new priest for All Angels with the help of the Vestry, Canon Durning and Canon Norman. The search effort included numerous parish meetings and the preparation of a Parish Survey and, the Parish Profile, done with the talented Vestry of All Angels.
Mr. Richard R. Helms  
St. Luke, Ft. Myers

**Biography:** Richard R. Helms (Dick) has served on the Diocesan Council for the past year as well as the diocesan Finance Committee. He is presently on the vestry and serves as treasurer at St. Luke’s in Ft. Myers. He and his wife Mary Lou attended Cursillo both as pilgrims and team members in our diocese. They attended Marriage Encounter and were team members for Engaged Encounter.

**Nominee Statement:** Dick is a former B-52 pilot and retired from the Air Force. They have worshiped in parishes in Louisiana, Ohio, Oklahoma, Texas, New York and California but call Florida home.

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**Election D:**  
**Disciplinary Board, Lay**  
Elect one lay person to a three-year term.

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Mr. Robert K. Sawyer Jr.  
Church of the Good Shepherd, Venice

**Biography:** I am married 22 years to Theresa Arbour from Montreal. We moved from Wilbraham, Mass. to Venice in 2016. We have 4 children and 7 grandchildren living in Massachusetts, Canada and the U.K. I was a Massachusetts attorney for 36 years, and retired in 2016 as Senior Vice President, General Counsel for Friendly’s Ice Cream. Church: I was baptized in 1969 at Christ Church Episcopal, Westerly, RI. Before moving to Florida, I served for 12 years as Chancellor of Christ Church Cathedral, Springfield, Massachusetts. I am enjoying my retirement with reading, new friendships and serving at my church. I also volunteer as an electrician building houses for Habitat for Humanity, South Sarasota County. I am currently serving my first term as Senior Warden at Good Shepherd, Venice. I serve as a Sub-Deacon/Acolyte and Eucharistic Visitor, and I also schedule several ministry teams. Last year, I served on the Vestry as Chair of the Visitor Care Commission.

**Nominee Statement:** In addition to my corporate experience and education, I served on the Congregational Enrichment Venture and the Standing Committee in the Diocese of the Central Gulf Coast. The work of the Church at all levels is vital and interests me. I have also served as spiritual director at Cursillo in my previous diocese (Central Gulf Coast) and will be serving in this capacity in October 2019 and February 2020 in the Diocese of Southwest Florida.

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The Rev. Robert Barry Crow  
St. Anne of Grace, Seminole

**Biography:** Currently, I serve as the vicar at St. Anne of Grace Episcopal Church, Seminole, FL. Prior to going to seminary at Sewanee, I earned a B.S. in Accounting from the University of Alabama at Birmingham (UAB) and a Master in Business Administration from Samford University in Birmingham, AL. My corporate career consisted of working as an accountant, budget manager, and Chief Compliance Officer and Director of Internal Audit in healthcare organizations in Alabama and Georgia. I chaired, worked with, and made reports to committees and boards of directors on a monthly basis. I feel I possess the necessary skills, qualifications, and experience to serve prayerfully and faithfully as a member of this committee.

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The Rev. Paige Alvarez Hanks  
Cathedral of St. Peter; St. Bede, St. Petersburg

**Biography:** It is critical that our clergy are held to the highest standards according to our Constitution and Canons. And we are a pastoral ministry. Combining high standards for behavior with attention to the care of those who might be struggling with boundaries is the work of the Disciplinary Board. Although I am a relative newcomer to the diocese, I am grateful for the ways that this diocese allows for collaborative leadership and care for one another. I spent over 20 years as a public school educator before discerning a call to ordained ministry, most of that time as an
Elementary School Principal. Although the majority of the teachers with whom I worked consistently remained in compliance with all district and educator standards, there were times when disciplinary actions were necessary to address issues these adults were experiencing. While these were difficult situations without fail, they were important to the life of the school and the safety of those in these adults’ care. Bringing those skills and experiences into this vocational setting would be helpful to the work of recommitting ourselves to what it means to be followers of Christ.

Nominee Statement: I have spent time as a Safe Church Trainer in two different dioceses, working to ensure the safety of all parishioners in all settings. As a lay leader, I was a human resources advisor to the Rector in hiring and retention strategies. In seminary, I served as Vice President of the seminarian student association, overseeing the by-laws review and revision process. My lay career as an educator combined with my vocational call as a priest in God’s church have opened the door for the ways I might serve beyond the local parish level. The fact that a Disciplinary Board exists at all is a credit to the ways in which we desire to hold ourselves accountable for our actions, and I pray that the Disciplinary Board is the least active ministry in the diocese because there are no issues to address. But if there is a need, I will humbly serve to restore the dignity of all involved and commit to seeing the image of God in all who come before us.

The Rev. Barry P. Kubler
St. Peter, Plant City

Biography: My wife of 50 years, Vonceal, and I, are the proud parents of two daughters and four grandchildren. Prior to my call to ordained ministry I was in the Army for 8 years, graduated from the University of South Florida, and worked for both product and service industry companies. I was ordained as a Permanent Deacon in 1991, serving as Deacon at St. Peter’s in Plant City. After attending seminary at Virginia Seminary in Alexandria, Virginia, I became rector of St. Martin’s in Hudson, Florida, serving there for over 7 years. I was then called as rector of St. Philip’s in Southport, N.C., where I served for 10 years. Upon retiring in 2014 we moved to Woodstock, Georgia, where I served as a retired Priest Associate at St. David’s in Roswell. In 2018 we moved back to Plant City, where I now serve as an extended Supply Priest during their search for a new rector.

Nominee Statement: I am currently serving as a long-term Supply Priest for St. Peter’s in Plant City. I retired from full-time ministry in 2014, and my wife, Vonceal, and I moved back to Southwest Florida in 2018. In my retirement I have continued serving the Church as a Supply Priest, Priest Associate, teacher and as Chaplain for several lay ministries. My interest in serving on the Disciplinary Board stems from my belief that the Church has an obligation to model for the world the attributes of justice, grace and forgiveness.

The Rev. David J. Marshall
All Angels by the Sea, Longboat Key

Biography: The Rev. David J. Marshall is Rector-elect of All Angels, Longboat Key. He received a B.A. in political science from Saint Martin’s University in Washington in 1991 and a Masters of Divinity from The Church Divinity School of the Pacific (Berkeley, California) in 2007. Although his degrees suggest some level of expertise in religion and politics, Father David prefers to talk about the joys and struggles of spirituality in daily life. Ordained as a deacon in 2007, and a priest in 2008, he has served in congregations in Coeur d’Alene, Idaho, and for the past ten years, in the Diocese of San Diego. His last two assignments required that he help transform splintered and struggling congregations into thriving centers of ministry. As a result of those experiences, he said it would be hard to overstate my joy and enthusiasm to serve All Angels — a solid and well-run congregation that is interested in developing a deeper sense of ministry and connection in the church family and the Longboat Key community.

David, who turned 50 in April, is a husband, father of four - two daughters he and his wife, Christi, adopted from Russia; shortly thereafter, they had their two boys, Ethan, 16, who showed tremendous grace and patience in moving to Bradenton during his sophomore year of high school, and Elijah, 9, who is thrilled to have a home with its own pool. Prior to seminary, David was a senior underwriter for an insurance company. Prior to his career in insurance, he worked at a retail company where he met Christi. He is an avid writer who creates a weekly column for the church and has been published in two daily devotional books through Forward Movement. He is working on a book about a pastoral response to global ecological change.

Nominee Statement: The two splintered congregations David served in California were troubled directly as a result of canons of the Church not being followed. He has deep and pastoral experience working with those who have been harmed by the Church — both clergy and lay people — and knows that good can come out of bad situations with God’s help. In the Diocese of San Diego, David served on the Diocesan Council and Executive Council, Strategic Planning Committee, the Clergy Health and Wellness Committee, Camp Steven’s Board of Advisors, Diocesan Mission Share Re-visioning Committee, and has mentored two deacons and one priest in field education prior to ordination. Outside the Church, he was a Commissioner on the Safety Commission of the City of Chula Vista and a board member for fundraising on the Parent Teacher Fellowship for Bonita Christian School.
**The Rev. Kevin C. Warner**  
*St. John the Divine, Sun City Center*  

**Biography:** I am married to my wife Sue, we just celebrated our 39th anniversary, and we have four sons and one grandson. I am entering my fifth year as rector of St. John the Divine where we recently completed a building program and have added a young assistant rector. Together with his wife and six children we are boosting our outreach to young families. I enjoy anything water-related, swimming, boating, skin and scuba diving. Originally from Michigan and most recently California, I especially appreciate the warmer waters of the Gulf over the Great Lakes and the Pacific. As a former High School teacher and coach I am proud of the strong youth ministry of our diocese. I have served as a parish priest for over 30 years in 4 dioceses. During that time service has included: Spiritual Director for numerous Cursillos, Vocares and Happenings. Chair of Constitution and Canons, Designed and led six sessions for Diocesan summer camping program, Dean of Convocation, Commission on Ministry, Church Growth Consultant, Stewardship Consultant, Design and lead Vestry retreats and renewal weekends for parishes, Served on the Board of Directors for ACTS 29 Ministries and adjunct faculty at Virginia Seminary on behalf of ACTS 29.  

**Nominee Statement:** Disciplinary Board is also something I have not yet served on but feel I have the skill set and experience necessary to do the job. First, I have been told more than once that I think like a lawyer. Most of the times it was meant as a compliment. Also, I have been part of multiple investigations of others and have a real sense of the process. I have seen the importance of following protocols and being transparent as possible in the work, but confidential where appropriate.

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**Dr. Navita Cummings James**  
*St. James House of Prayer, Tampa*  

**Biography:** Originally from the Diocese of Southern Ohio, I have been a member this diocese and St. James House of Prayer (Tampa) for over thirty years. Since my teen years, I have served many roles in parish, diocesan, provincial and national church life including at the parish level, Sr. Warden, Sunday School Director, Confirmation Instructor and member of choir, Worship, Altar Guild, Call and other committees. At the Diocesan level, I regularly participate as delegate from my church in our annual conventions, and I have been elected by this convention to serve as a Lay Deputy to five General Conventions—one of which I served as our diocese's first lay person to head a deputation. Also in the Diocese, I have worked on Anti-Racism and Racial Reconciliation committees, trainings, convention and workshops and formerly worked with the Chapel Center @ USF, served on the Ecclesiastical Court, consultant to Bishop Call Committee and assisted with Happenings and New Beginnings weekends. I made my own Cursillo at Coed #5 and recently participated in a prayer team supporting the work of DaySpring fundraising. At the national level; I have served on General Convention Legislative Committees focusing on national and international concerns and issues; served as a Chair of the Executive Council Committee on Anti-Racism; and for several years was an Episcopal Church national anti-racism trainer.  

**Nominee Statement:** I feel very blessed to have had this wide range of experiences within our church at these multiple levels and believe taken together they continue to give me valuable insights into many issues and challenges facing The Episcopal Church today. In my personal life, I am an associate professor of Communication at the University of South Florida specializing in communication and cultural diversity. I am married to Julius James, a Cursillo musician, and am the mother of adult daughters. I am proud to be a lifelong member of what our Presiding Bishop now calls “The Episcopal Branch of the Jesus Movement” and of the worldwide Anglican Communion. In the United States today, we are one of the best-kept secrets of the Christian Church, and I think that is both good news and bad news. Good news because we have a lot to offer seekers and bad news because a lot of young people today have no idea who or what The Episcopal Church is. Unfortunately, what many of them know about Christianity is what they see on TV and therein lies a huge part of our challenge for growth. But the world is changing and how we, The Episcopal Church, change...
with it is a huge challenge before us. While I continue to believe
the church has an important ongoing role in racial reconciliation
and social justice, my current passions and where I am also glad to
share my spiritual, academic and organizational gifts include (1)
church evolution and growth including how to keep in and attract
young adults to our church; (2) understanding and enhancing
the experiences of women in the ministry and women’s spiritual
growth overall; and (3) supporting the presence and influence of
The Episcopal Church in the worldwide Anglican Communion. If
elected to serve as a lay deputy again, I will be honored to use and
share my gifts wherever and however the Holy Spirit leads me in
the work of our General Convention.

Ms. Anna C. Haefner
Church of the Redeemer, Sarasota

Biography: I am a cradle Episcopalian, baptized as an
infant. I spent my childhood living around the world, being the
daughter of a military officer. It was in those early years that I
learned to appreciate that the church is the community of people, and not
a specific building. Since moving to Sarasota 29 years ago, I have been
involved in many varying roles, first as a teenager, then into my adult life.
I have been a very active member in three congregations: Church of
the Nativity, Sarasota, Church of the Holy Spirit, Osprey, and Church
of the Redeemer, Sarasota. I have
served on the vestry in two of these
congregations, once serving as the Junior Warden. Much of my
professional experiences have been in the medical field, working
in the front office specializing in medical billing. I also have
experience working in the retirement community setting, both
doing administrative work and coordinating activities. I was
the Housing Manager for over 2 years at a non-profit agency
providing permanent supportive housing for people coming out of
homelessness. I am currently working in retail in a family-owned
appliance parts company.

Nominee Statement: I am a single mother, with an adult son.
I have been active in youth ministry as a youth and as an adult,
both on the parish and diocesan level. I have served on several
New Beginnings and Happening Teams. I have been a member of
the Happening Steering Committee. I was also a member of the
State Epiphany Board, and served on several Epiphany teams (a 3
day weekend format serving incarcerated youth). On the parish
level I have been involved in Alpha, serving as a table leader and
participating in two national conferences. I am also a Eucharistic
Minister. I have been extremely active in Cursillo over the past
24 years, serving in numerous leadership positions in varying
capacities within the ministry. I am active in healing ministry,
serving on numerous Amazing Love Healing Conferences around
the state of Florida. I also had the privilege to serve on the most
recent Bishop Nominating Committee in our diocese. I have
attended almost all of the diocesan conventions over the past 29
years, as a visitor, as a delegate, and as an alternate. I had the honor
of being elected and serving as a Deputy to the 79th General
Convention. Last fall I was appointed by the Office of the House
of Deputies to the Task Force for Communion Across Difference.
This is an interim body that will report to the 80th General
Convention. I believe that being in my mid-forties, having been an
active member of this diocese for over half of my life, participating
in many diverse ministries, and interacting with a broad spectrum
of our diocesan community, I am extremely familiar with who we
are as a diocese, and recognizing our place in the national church.
I feel that I bring a valuable perspective and experiences to this
deputation.

Mrs. Joan O. Kline
Church of the Ascension, Clearwater

Biography: Committee chair, DaySpring Episcopal Center
Master Plan Project; past diocesan ECW President; national ECW of the Episcopal
Church “National Honored Woman”; formerly served on the diocesan Standing
Committee; served two six-year terms on Diocesan Council; board of directors
Dominican Development Group; served on two Diocesan Committees to elect our
bishops; Consecration Committee for three of our diocesan bishops; co-chair
Diocesan Capital Fund Feasibility Study; DaySpring Board of Trustees; chaired
National Association of Episcopal Schools Convention; former chair SWFL Diocesan Convention; Anglican
Fellowship of Prayer International Conference Committee; mission
trips to the Dominican Republic; Cursillo team member; Church
of the Ascension Vestry two three-year terms; Altar Guild 23
years; choir 30 years; choir mother; ECW President; Long Range
Planning, Stewardship, Parish Council, Hospitality, Organ and
Music Committees.

Nominee Statement: It has been my joy to have served on
many levels in my parish, Church of the Ascension, our Diocese
and the national Episcopal Church. It has been a blessing and a
privilege to have worked in so many different areas of ministry
either by appointment or election. The most exciting and
exhilarating work that I have been blessed to be involved in is
the duties of a Deputy to General Convention. I believe I bring
assets to the work of a General Convention Deputy and to our
own Deputation. The first is experience and continuity. I am
honored to be the first woman from Southwest Florida to become
a Senior Deputy in the House of Deputies in 2006 and have held
that distinction for the subsequent General Conventions. My
position has also brought recognition to our Deputation. There
are usually no more than 50-56 Senior Deputies out of almost
900 in the House of Deputies. I have served on several national
Episcopal boards, committees, and standing commissions. My
General Convention service and experience includes Legislative
Committees at five General Conventions; six years on the National
Standing Commission for Stewardship and Development;
three years on the National Standing Commission for Small
Congregations; and General Convention Vice-Chair for the
Legislative Committee on Small Congregations by appointment of
the President of the House of Deputies.

I have gained experience with this unique process of General
Convention and it has taught me to focus on a vision for our
Church, studying the church’s needs and addressing those needs in
our changing world. One of the major issues that came before the
2015 General Convention was the “Structure of the Church.” That
restructuring has begun and will take place for the next several
Mr. Devon M. Shank
Holy Innocents, Valrico

Biography: I am 19 years old and born in Tampa. I grew up attending St. Clement's in Tampa with my grandmother who was the nursery attendant. This diocese has been a large part of my life from my infant years. Growing up I followed a traditional track through school. Attending public elementary, middle, and high school in Pasco County. I was extremely blessed to have the opportunity to dual enroll at Pasco-Hernando State College. During my junior and senior year, I successfully completed an AA degree with a natural sciences concentration and also received a kitchen manager certification. With such deep roots in Tampa post high school graduation, I have always wanted to go to USF. My current hope is to attend medical school. I intend to not rush my college years I added a second major in order to spend three years instead of two at USF. On my current track I will graduate in May 2021, with a B.A. in Political Science and a B.S. in Human Biology. I am extremely grateful that I could add the Political Science to my course work; it is something I truly enjoy learning.

Nominee Statement: At the beginning of this last academic year I started to attend Holy Innocents. I was speaking from my heart when I wrote that the diocese has been a huge part of my life. I currently live in an apartment in Temple Terrace with people I met working Camp DaySpring. I look forward to whatever comes next. Growing up at camp truly formed my spiritual journey. Starting diocesan youth programs the first summer I was able, rising into third grade. I returned every year I was eligible. Starting my freshman year in high school I began to work New Beginnings as a high school team member. By my junior year I served as the JWA which is the team leader at New Beginnings and served my first full summer at DaySpring as a JC. Through the leadership skills I learned I was blessed to travel to Utah and Central Florida to assist in planting youth retreats with them. I was also privileged to serve as a team member on the youth team that planned Episcopal Youth Event 2017. Which is an event that is held for the youth of the church every three years. I was truly lucky to serve on the team coordinating liturgy and music for the event.

I attended the General Convention in Austin as a member of the young adult festival. That is a companion event that is put on by the young adult ministry office to show young people General convention. While the activities were interesting I most enjoyed sitting on the floor and listening to debate. The governance was what interested me the most. After spending the last year discerning, I have decided that I feel a call to stand for election as lay deputy. I think my generation is not just the church of the future but the church of the present as well. I will stand up to help care for it, because I can’t claim to be a good steward without helping to set the course for a prosperous future.

Ms. Jacqueline (Jackie) Smith
St. John, Clearwater

Biography: I was born and raised in Cleveland, Ohio. I was married and had two girls. They have had five children between them, and I have a great grandson too. I worked for the City of Cleveland as a truck driver I was the first female truck driver in the department. I worked my way up through the ranks from truck driver to assistant manager of park maintenance. We maintained city parks, public properties including vacant lots and house. I became an Episcopalian in 1980, and have been active in the church ever since. In Cleveland I was an usher, Sunday school teacher, choir mom, altar guild, breakfast coordinator, chalice minister, vestry member, adult youth leader (local and diocesan level), and a member for commission for Racial understanding (diocesan level), EYE adult youth leader (national), also a member and past chairman of the S.T.A.R.T. Board (Support to At Risk Teens) and in the diaconate program. I retired in 2012 and moved to Florida. I enjoy playing pinochle, traveling and going out dancing.

Nominee Statement: Since I have moved to Florida I have served as AIDS Partnership Dinner Coordinator (volunteer), volunteer for Empath Health daily, a member of Faith in Action Strength Together (a justice ministry), attended Cursillo, chalice minister, Eucharistic visitor, and work with the acolytes. I have become a Daughters of the King Chapter President and now serve as vice president of the DOK for the Diocese. I served on the vestry as the Junior Warden (2015-17) and during my tenure, I supervised our parish hall renovation, led the clean up after Irma and helped file insurance claims and follow-up repairs after a break-in. I’m back on the vestry as the Junior Warden. I am a go getter, hard worker, I believe in getting the job done. I know how to listen to both sides of an issue and come up with a decision. I would like to be more involved in the decision making of the church and see more of a change. I’m always willing to raise my hand and say, “Here I am Lord.”
Mr. David Andrew Yow
Church of the Redeemer, Sarasota

**Biography:** I was born and raised in Sarasota Florida, and I am a lifelong member of the Church of the Redeemer. For the last ten years I have attended Episcopal schools in Austin Texas (Saint Stephen's Episcopal School) and New York (Saint Thomas Choir School). Currently, I am a sophomore at Sewanee: The University of the South. While attending these institutions, I have had the pleasure of working with chaplains and their staff to craft programming and practices that create a sense of welcome for all people, seeking to involve as many students as possible in the life of the local church, while also recognizing a need to adequately meet the spiritual needs of today's youth, utilizing the many resources the Episcopal Church has to offer. While at school, I have served as Senior Sacristan (2016-2018), Student Government (2014-17, representative; 2017-18, president), and headed the Admission office's welcome committee (2015-18). Currently, at Sewanee, I serve as a leading member of the Student Invite Welcome Connect team, working to adapt the existing program to a campus ministry model.

When home, I serve Church of the Redeemer as a member of the choir, an acolyte, LEM, participate in the youth group's mission work, and attend the Saint Michael's Conference for Young People in Connecticut, joining a sizable delegation from our parish.

**Nominee Statement:** On a trip to visit friends in July of 2018, I was able to visit the 79th General Convention, held in Austin, Texas. Intrigued by the legislative process of the church, I spent a day sitting in on meetings of both houses. While I am grateful for those who have given their time to this important duty, I was saddened by the lack of young people on the floor of convention. This spring, while speaking with friends also involved in the life of the church, we all sensed that the national church lacked sufficient young voices within our governing body. Following this revelation, I decided to put myself forward for nomination in our Diocese, feeling that God has called me to represent our diocese and youth at the 80th General Convention of this church.

As the church places an increased emphasis on evangelism and inclusion, I feel it is important to have a convention that represents all attributes of the Episcopal Church. I believe that my efforts thus far in school ministry place myself in a unique position to consider the legislation of the wider Episcopal Church. In particular, how new policies and canons in the church affect those young people who are beginning to take an active role in the life of the Church, as well as those whom the church will reach in the coming years.

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**The Very Rev. A. Charles Cannon III**
St. Hilary’s Episcopal Church

**Biography:** I am a lifelong Episcopalian, the son of a priest and seeking an opportunity to serve this Diocese and Episcopal Church as a priest Delegate to the General Convention. I was baptized, confirmed and have lived the life of a lay person and ordained. I have lived and served in 8 dioceses including 3 in Florida. Between age 7-40, I served as a faithful member of the Episcopal Laity: as the altar as an acolyte, as a lay reader, as a Eucharistic Minister, as Sunday school teacher, as a vestry member and as Junior Warden. God called me into Holy Orders in 1992; enrolling in the Diocesan School for Ministry in Southeast Florida in 1994. I was ordained Deacon in 1998. My 13-year diaconate was filled with opportunities to serve teenaged runaways, the poor and the disenfranchised in Palm Beach County before being called to seminary and the priesthood in 2008.

**Nominee Statement:** I am currently serving at Saint Hilary’s Episcopal Church where I have been rector since January 2014. One focus of my ministry has been to become involved in the work of the diocese. I have never been to General Convention and would be honored to serve this diocese as delegate. After 5 years, as Fort Myers’ clergy representative on Diocesan Council, and as the appointed dean of Ft. Myers Deanery by the bishop for 3 years. I have experience in the needs and wants of this diocese. Today I am seeking the Convention’s support and endorsement of my candidacy as clergy delegate to General Convention.

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**The Rev. Canon Katie Churchwell**
Cathedral Church of St. Peter

**Biography:** The Rev. Canon Katie Churchwell serves as a priest at the Cathedral Church of St. Peter. As Canon for Community Formation, Canon Churchwell works both within the church and the larger community to integrate the Cathedral into the vibrant community that is St. Petersburg. Canon Churchwell is president of the Downtown Business Association and on the board of Health360- a program that brings free health education, health screenings, and fresh produce to food desert communities. She is also the face of Pop-up Prayer, a live prayer video ministry located on Facebook. With over 10 thousand views a week, Pop-up Prayer is an innovative tool to share God’s love where people gather, creating sacred space in the unlikely world of social media.
Nominee Statement: Having served as an alternate for the last General Convention, I am well versed in the demands of the position- from the monthly gatherings to the travel to both Province IV gatherings and Convention itself. I firmly believe in the future of the Episcopal Church- a future that is both hopeful and demands hard work and faithfulness of all Episcopalians. The kingdom of God that we know is one that our communities are searching for and Jesus’ message of love for all people is one that requires courage to share. We are faced with the unique opportunity to rely on our traditions while letting go of the way we have always done things to share this vision of God’s love as found in our churches. I look forward to representing the Diocese of Southwest Florida, showing the diversity, collaborative nature, and steadfast faithfulness of this Diocese with the wider church.

The Rev. Matthew T. Grunfeld
Annunciation, Holmes Beach

Biography: I am originally from Columbus, Georgia, and grew up in the Episcopal Church. I have a B.A. from Emory University. With the encouragement of my college chaplain, I entered the ordination process in the Diocese of Atlanta. I was ordained to the priesthood in 2008, following graduation from the General Theological Seminary. I served as a hospital chaplain in a year-long clinical residency program. Before coming to Annunciation on Anna Maria Island, I was rector of two small parishes in Alabama. In the Diocese of Alabama, I was a member of Diocesan Council, a trustee of Holy Cross Episcopal School, a summer camp chaplain at Camp McDowell, on the advisory board of Kairos Prison Ministry at the Staton Correctional Facility, and on the deputation to the 78th General Convention (2015). In the Diocese of Southwest Florida, I am a member of Diocesan Council, a faculty member for the School for Ministry, a chaplain for DaySpring Summer Camp, a spiritual advisor for Cursillo 141, and a board member for All Island Denominations on Anna Maria Island. I am also preparing to go on a four-week short-term mission trip to Our Little Roses home in Honduras. I have done continued professional development in the College for Congregational Development, the Episcopal Church’s Start Up! Start Over! program, the joint Northwestern University-Bexley Seabury Leadership Institute, and coursework for the Pastoral Care Specialist certificate with the American Association of Pastoral Counselors. I also have reading and liturgical proficiency in Spanish. Beyond the church, I enjoy traveling, kayaking, and the Atlanta Braves.

Nominee Statement: We live in an age of rapid change in church and society. The major challenge before the Episcopal Church and the General Convention is to respond so that our church continues to be a faithful witness to the joy and hope found in the Gospel message. We must continue to align our structures and governance in ways that will equip our parishes and people to be faithful to the mission that Jesus entrusted to us. As the rector of a parish in a resort community, I routinely worship with seasonal residents and visitors from across the Episcopal Church and the broader Anglican Communion. I am constantly reminded of the connection I share with faithful Christians far beyond my own community in the Church catholic. The work of General Convention plays a vital role in drawing us together as the Body of Christ, with all its joys and imperfections. In a season where the most recent General Convention approved beginning a liturgical revision process, I want our liturgy to continue to be undergirded by soundness of theology and quality of language. I believe it is important we continue to be drawn together as a people of Common Prayer.

The Rev. Adrienne R. Hymes
St. Anselm’s, USF
Wesley Chapel Episcopal Church

Biography: The Rev. Adrienne R. Hymes is the diocesan Missioner for Church Extension, appointed by Bishop Dabney Smith in October 2016. Since her appointment Hymes was ordained to the diaconate in 2017 and to the priesthood in 2018. Hymes, a life-long Episcopalian and native Virginian, was led to the diocese in July 2014, after earning her M.Div. from Virginia Theological Seminary. She is a clinically trained chaplain (CPE residency) with emergency room (ER)/trauma experience. For more than 13 years, prior to following God’s call for her life, Hymes was a seasoned public relations and marketing executive in Washington, DC and Los Angeles, having begun her career in television broadcast journalism. Her skills and training, paired with her natural entrepreneurial disposition, have uniquely equipped Hymes to engage the unique and layered mission fields of the University of South Florida Tampa campus and the rapidly expanding suburb of Wesley Chapel. In her role as Missioner for Church Extension, Hymes is the resident Chaplain and Director at St. Anselm’s Episcopal Chapel Center at USF and the diocesan church planter for the growing Episcopal worshiping community at USF. Wesley Chapel. In the period of three years, the campus ministry at USF has been revitalized; impacting the lives of people across the USF community; and partners with USF leadership to support student wholeness. The church plant, Wesley Chapel Episcopal Church, once merely words in a planning document, moved into a dedicated worship space in July, and is actively growing. Hymes is an internationally published advocate for the specialized practice of workplace chaplaincy, her master’s thesis, and has studied the practice extensively in the U.S. and the U.K. Hymes earned her B.A. degree in Rhetoric and Communications Studies from the University of Virginia in Charlottesville. Beyond the life of the church, Hymes is an avid movie-goer, and enjoys sewing and crocheting.

Nominee Statement: As a life-long Episcopalian I was raised with a deep love and appreciation for the Episcopal Church as a part of my identity. From a very young age the responsibility and privilege of being formed as a leader, and serving as a leader, at all levels of the church, was modeled for me and instilled in me. At the 2009 General Convention in Los Angeles I served as press representative for my church and as advisor for the Office of Black Ministries’ week-long youth leadership development program. Access to the processes and procedures of our church’s delicate and complex infrastructure, as it responds to the needs of its people, was invaluable. While in seminary, I completed a portion of my field education at The Church Center in New York, serving full-time for one-month in the Missioners’ office. Being immersed in that
environment further fueled my existing pull to learn as much as possible about the inner workings of our church and its ministerial priorities, while discerning how my own abilities and gifts might contribute value to the health of the church. God has equipped me with a visionary spirit, which thrives in the uncertainty of Holy Spirit movement, and gifts for communication across diverse populations essential for caring for the church's vitality now and into the future. As the church we cannot be all things to all people; it's just not possible. I do believe that with a renewed commitment to safeguarding our rich Episcopal/Anglican tradition, embracing it's just not possible. I do believe that with a renewed commitment to safeguarding our rich Episcopal/Anglican tradition, embracing the reality that we can be ever-ancient, ever-new; our beloved church can mean something to all of God's people; and that's absolutely possible. I humbly request your consideration for deputation to the 2021 General Convention and will effectively advocate for the positions of our diocese as entrusted.

The Rev. Bryan D. O'Carroll
Holy Innocents, Valrico

**Biography:** Diocesan/deanery/parish activities include clerical deputy to 2018 General Convention. Commission on Ministry (Member 2011-2016, chair 2016-18), Chaplain SCF 2014-18, DaySpring Summer Camp Chaplain 2013 to present; Past member of Youth Leadership Team, New Beginnings Coordination Team 2004-8.

**Nominee’s statement:** I have actively served this Diocese first as a lay person and now as Priest for a combined 20 years. Having effectively served in many diverse leadership positions it is my hope to bring these experiences and knowledge to this important role. When serving God’s Church it is always my desire to live into Paul’s words that “Rather, speaking the truth in love, we are to grow up in every way into him who is the head, into Christ (Eph.4:15)” It would be my privilege to serve our Diocese in this capacity as we continually strive to maintain our unity and diversity as followers of Jesus.

The Rev. Roy W. Tuff
Good Shepherd, Punta Gorda

**Biography:** I grew up working in the family newspaper/printing business in a small town where we also worked at our nursery/greenhouse, bakery/cafe, and helping inside and outside around the house. We always went to Church where we participated in many ways, especially through music. Our family newspaper business brought us all to Naples in 1989. It’s hard to believe we’ve been in Southwest Florida for 30 years. The Episcopal Church has been a place of blessing and reconciliation for my family. We were introduced through the music program at Trinity-by-the-Cove, Naples in 1994. From there, my wife Maria and our family of five were well supported through the Diocesan discernment/ordination process. Now our family has grown to include four grandchildren that remind us constantly of the miracle of life and wonder of discovering new things through a love that continues to bless our ties that bind.

**Nominee Statement:** If elected, this will be my third General Convention. I have loved and learned more than I can recount in 300 words or less. General Convention is massive in its scope and experience is invaluable in navigating the complexities inherent in governing the Episcopal Church. I have gained incredible respect for the House of Bishops whose grace, care, and wisdom often guides the House of Deputies towards resolutions that have a better chance of sharing the Good News of God in Christ in ways that actually bring blessings to the body of Christ, the Church. You have to get older to have more experience. I have gained considerable experience in Episcopal youth, school, and parish ministries through P.Y.E., E.Y.E., Happenings, School Chaplaincies, and now as Rector for nine years. I have come to realize how precious and precarious our place in God’s world is. Proclaiming the Gospel to a generation with fewer and fewer opportunities to be heard is more critical now than ever. Borrowing some of the words from the collect for the fifth Sunday in Lent, the Episcopal Church needs constant reminders to continue to look to God in order to be useful to God. We can be a willful lot who seek our own gratification. Our governance needs to focus on loving and embodying what God commands in preparing to receive God’s blessings. And so my desire among the swift and varied changes of the world is that our hearts may surely there be fixed where true joys are to be found; through Jesus Christ our Lord.

The Rev. Kevin C. Warner
St. John the Divine, Sun City Center

**Biography:** I am married to my wife Sue, we just celebrated our 39th anniversary, and we have four sons and one grandson. I am entering my fifth year as rector of St. John the Divine where we recently completed a building program and have added a young Asst. Rector. Together with his wife and six children we are boosting our outreach to young families. I enjoy anything water-related, swimming, boating, skin and scuba diving. Originally from Michigan and most recently California, I especially appreciate the warmer waters of the Gulf over the Great Lakes and the Pacific. As a former High School teacher and coach, I am proud of the strong youth ministry of our diocese.

I have served as a parish priest for over 30 years in 4 dioceses. During that time service has included: Spiritual Director for numerous Cursillos, Vocares and Happenings. Chair of Constitution and Canons, Designed and led six sessions for Diocesan summer camping program, Dean of Convocation, Commission on Ministry, Church Growth Consultant, Stewardship Consultant, Design and lead Vestry retreats and renewal weekends for parishes, Served on the Board of Directors for ACTS 29 Ministries and adjunct faculty at Virginia Seminary on behalf of ACTS 29.

**Nominee Statement:** General Convention Delegate is something I have always wanted to do but could not afford the time away from family or the parish. Now that the children are up and out and I have adequate staffing, I would like the opportunity to be a part of the church’s largest gathering.
The Rev. Ryan R. Whitley  
St. Thomas, St. Petersburg  

**Biography:** I was born and raised in this Diocese. From early on, I grew to take seriously my relationship with Jesus Christ and accepted my call to ordained ministry here at an early age. After graduating from Wake Forest University and Seabury-Western Theological Seminary, I was called to serve as Curate at St. Mark’s Church in Carrollwood, Tampa. After three and a half years there, I accepted the call to serve as Rector of St. George’s, Ardmore, PA, a position I held for almost eight years. In 2017, I was elected the next Rector of St. Thomas’ Episcopal Church in St. Petersburg, FL and joyously returned to my home state and diocese. I am married to Elise Woodroffe Whitley (this year we celebrated ten years of marriage) and together we are the proud parents of two children, Jackson, (8) and Caroline (5), in addition to one unruly rescue mutt.

**Nominee Statement:** It would be an honor to represent this Diocese at the General Convention. Though I have done much in and with the church, I have never been a delegate to General Convention, and would look forward to turning fresh eyes on the governance of our great church. God, through the Holy Spirit, calls us each to our various ministries based upon the gifts we have received though God’s grace. As I stated in another nomination, I believe that God is nudging me now towards greater responsibilities and I look forward to the opportunity to stand for election as a Deputy to the General Convention. As I reflect on the last general convention and the opportunities and challenges before us, I feel like it is important that you know a little bit more about me. I believe that any future revision of the Book of Common Prayer must be entered into from a theological position of integrity and not in response to emotional anecdote. Even though I am a social progressive, I am a liturgical traditionalist. I hold to the historic Creeds of the Church and believe in the real power of the sacraments to transform lives. Whoever has a hand in writing the next prayer book, I pray that they listen deeply to the theologians, but also to the poets.

I have many gifts for leadership, and have put those to use in the church in many and varied ways, from serving on Diocesan Council, to being the Ecumenical and Interreligious Officer, from chairing Convention in the Diocese of PA for three years, to serving as a faculty member for Fresh Start. As a career clergyperson, I bring a deep understanding of, and experience with, how the church functions. As a younger clergyperson, I will be in the church, God willing, for many years to come and would take any responsibility to shape its future with great faithfulness.

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The Rev. Christian M. Wood  
Church of the Redeemer, Sarasota  

**Biography:** I was born and raised in Queens, New York, a graduate of the City University of New York John Jay College of Criminal Justice, B.S. Legal Studies and of Nashotah House Seminary, MDiv. I am a lifelong Episcopalian, and in 2016 was called by the Church of the Redeemer in Sarasota to be Priest Associate for youth and young adult ministry. I have since changed positions and am now Priest Associate for Christian Formation at Redeemer. I have a keen understanding of strategic planning and never act without prayer and time to reflect.

**Nominee Statement:** I am excited about being nominated to serve as a deputy to General Convention. I see it as a chance to continue to take my place in the life of our diocese and the national church. In 2016 I graduated Nashotah House Theological Seminary and was recalled to serve at Redeemer and the Priest Associate for youth and young adult ministry. Since returning, our high school youth attendance has increased by over 60 percent, and I have accepted a new call as Priest Associate for Christian Formation. I also teach our youth confirmation classes.

I have served on the Youth Leadership Team in the diocese and also serve on the board of the Dominican Development group. Redeemer has made remarkable advances in the areas which I have been called to serve. From Youth Ministry to comprehensive Adult Formation opportunities, Redeemer is on the cutting edge in The Episcopal Church by providing quality, well-presented offerings for our congregation to grow, share, and worship in the power of the Holy Spirit, and the name of Jesus.

In my spare time, I enjoy playing softball with Redeemer’s new softball team the “Big Red Machine” I also love to cook and spend time with my wife Kate, and three children, Maggie-Jane 9, Michael 6, and Martha 3. We like to walk together, to cook together and pray together.
Election H:
University of the South Trustee
Elect one lay person to a three-year term.

Mr. Gregory A. Hearing
St. John, Tampa

**Biography:** I am a life-long Episcopalian. My parish is St. John’s Tampa where I attended the Parish Day School and graduated in 1978. After graduating high school in 1982, I attended The University of the South, graduating Phi Beta Kappa in 1986. Thereafter, I attended the Florida State University College of Law, graduating with honors in 1989.

**Nominee Statement:** I have practiced labor and employment law in Tampa for the past 30 years. I have had the honor of serving the Diocese as a vice chancellor since 1991 and have chaired the Resolutions Committee of the Diocese for many years as well. I previously served as a trustee at The University of the South on behalf of the Diocese. In my parish, I am currently serving as the Senior Warden and have served as a trustee of the parish day school for many years, including serving as its vice chair for several years. I am married to Kamra Hearing and together we have raised four young men, all of whom graduated from St. John’s Tampa. I am active in the Tampa community and have served on several non-profit boards. I would be honored to serve the Diocese as a Trustee for The University of the South.

Mr. David R. McCallister
St. Catherine, Temple Terrace

**Biography:** I was born and raised in Miami, Florida. I attended St. Mark’s School (Episcopal), Southborough MA.; Winchester College, England; Emory University (BA history); and Stetson College of Law. I am a practicing attorney in the Tampa Bay area. I am a member of the Hillsborough County Diversity Advisory Council. I have been a candidate for the Florida House of Representatives. I am a cradle Episcopalian. I have been a Senior Warden and Vestryman and know the operations of a congregation.

**Nominee Statement:** I have been on the Ecclesiastical Court, Disciplinary board, and other Diocesan positions. I have run for Trustee of the University of the South several times, and last time was almost voted in. I am inclined to a traditional Anglican point of view and hope to bring this to Sewanee. There is no requirement for Trustees to be Sewanee graduates. If elected, I would be honored to serve the Diocese, the school, and the Church in this position.
Election I:
University of the South Trustee
Elect one presbyter to a one-year unexpired term.

The Rev. Robert Barry Crow
St. Anne of Grace, Seminole

**Biography:** Currently, I serve as the vicar at St. Anne of Grace Episcopal Church, Seminole, FL. Prior to going to seminary at Sewanee, I earned a B.S. in Accounting from the University of Alabama at Birmingham and a Master's in Business Administration from Samford University in Birmingham. My corporate career consisted of working as an accountant, budget manager, and Chief Compliance Officer and Director of Internal Audit in healthcare organizations in Alabama and Georgia. In these capacities, I chaired and worked with and made reports to committees and boards of directors on a monthly basis. I feel I possess the skills, qualifications, and experience to serve prayerfully and faithfully my diocese, my church, and my alma mater as a trustee for the University of the South.

**Nominee Statement:**
In addition to my corporate experience and education, I served on the Congregational Enrichment Venture Task Force and the Standing Committee in the Diocese of the Central Gulf Coast. The work of the Church at all levels is vital and interests me. I enjoy the work beyond that of the individual church at the local level, for this work reminds us that we are connected relationally as a diocese and are more than individual congregations. Indeed, we are part of something much larger - the Body of Jesus Christ beyond our four walls. I have also served as spiritual director at Cursillo in the Diocese of the Central Gulf Coast and will be serving in this capacity in October 2019 and February 2020 in the Diocese of Southwest Florida.

The Rev. Richard T. Earle III
St. Vincent, St. Petersburg

**Biography:** I was born and raised in St. Petersburg Florida. My family belonged to St. Peter's Episcopal Church and I was Baptized and Confirmed there. I left St. Petersburg to attend The University of The South (Sewanee) and after graduation I attended law school at The University of Florida. Upon graduation I returned to St. Pete to begin the practice of law with my father and I have practiced law ever since. Upon the death of my father, over the course of time, I became a sole practitioner. At Sewanee I became active in the church and as time passed, I have continued to increase my activities in the church and in 2002 I was ordained a Deacon. My desire to learn more about the church led me to further my education through enrollment in a seminary. While at the seminary I was encouraged to discern whether I was called to ordination as a Priest. I went through the discernment process and I was ordained a priest in 2007. I currently serve as an assisting priest at St. Vincent's Episcopal Church in St. Petersburg.

**Nominee Statement:**
The most important gift I will bring to The University of The South is my love for Sewanee. I arrived at Sewanee a young immature boy with average academic history. I left Sewanee a mature young man with a wonderful academic history. I arrived at Sewanee having no history of involvement with the church other than attendance. I left Sewanee having become involved with the church. I credit these changes to Sewanee. I have been involved with Sewanee since my graduation. I am an annual donor to The Sewanee Fund, taken the Education For Ministry course (EFM) and acted as a mentor for the EFM course. I attend my Sewanee class reunions and visit the campus every chance I get. I have seen Sewanee grow and change, attended a seminar explaining the change and growth planned for the future, including their desire to expand the University and its life into the village. I want to be a part of this change and growth.
Voting Worksheets

Use these worksheets before you fill out your ballot, or to add nominations from the floor.

**Election A**
Standing Committee, Lay

Elect Two Lay to a Three-year Term

1. Mr. Philip K. Beauchamp
   Church of the Good Shepherd, Dunedin

2. Mr. Duane A. Hollier Sr.
   St. Martin, Hudson

3. Ms. Jacqueline Smith
   St. John, Clearwater

4. Mr. Ray U. Stoll
   St. John, Tampa

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13. ________________________

**Election B**
Standing Committee, Presbyter

Elect One to a Three-year Term.
Elect One to a Two-year unexpired term.

1. The Very Rev. A. Charles Cannon III
   St. Hilary, Ft. Myers

2. The Rev. Bryan D. O’Carroll
   Holy Innocents, Valrico

3. The Rev. Ryan R. Whitley
   St. Thomas, St. Petersburg

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13. ________________________
Election C
Diocesan Council, At Large
Elect Two Lay Persons
1. Mrs. BJ Webb Bishop
   All Angels by the Sea, Longboat Key
2. Mr. Richard R. Helms
   St. Luke, Ft. Myers
3. ____________________________
4. ____________________________
5. ____________________________
6. ____________________________

Election D
Disciplinary Board, Lay
Elect One Lay Person
1. Mr. Robert K. Sawyer Jr.
   Church of the Good Shepherd, Venice
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Election E
Disciplinary Board, Clergy
Elect Two Clergy
Elect One clergy to a one year term
1. The Rev. Robert B. Crow
   St. Anne of Grace, Seminole
2. The Rev. Paige A. Hanks
   St. Bede & Cathedral, St. Petersburg
3. The Rev. Barry P. Kubler
   St. Peter, Plant City
4. The Rev. David J. Marshall
   All Angels by the Sea, Longboat Key
5. The Rev. Kevin C. Warner
   St. John the Divine, Sun City Center
6. ____________________________
7. ____________________________
8. ____________________________
9. ____________________________
10. ____________________________
11. ____________________________
12. ____________________________
13. ____________________________
14. ____________________________
15. ____________________________
Election F  
General Convention  
Elect Four Lay Deputies; Two Lay Alternates  

1. Dr. Navita Cummings James  
   St. James House of Prayer, Tampa  
2. Ms. Anna C. Haefner  
   Church of the Redeemer, Sarasota  
3. Mrs. Joan O. Kline  
   Church of the Ascension, Clearwater  
4. Mr. Devon M. Shank  
   Holy Innocents, Valrico  
5. Ms. Jacqueline Smith  
   St. John, Clearwater  
6. Mr. David Andrew Yow  
   Church of the Redeemer, Sarasota  
7.  
8.  
9.  
10.  
11.  
12.  
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14.  
15.  
16.  

Election G  
General Convention  
Elect Four Clergy Deputies; Two Alternates  

1. The Very Rev. A. Charles Cannon III  
   St. Hilary, Ft. Myers  
2. The Rev. Canon Katie Churchwell  
   Cathedral Church of St. Peter, St. Petersburg  
3. The Rev. Matthew T. Grunfeld  
   Church of the Annunciation, Holmes Beach  
4. The Rev. Adrienne R. Hymes  
   St. Anselm's Chapel Center /USF; Wesley Chapel  
5. The Rev. Bryan D. O'Carroll  
   Holy Innocents, Valrico  
6. The Rev. Roy W. Tuff  
   Church of the Good Shepherd, Punta Gorda  
7. The Rev. Kevin C. Warner  
   St. John the Divine, Sun City Center  
8. The Rev. Ryan R. Whitley  
   St. Thomas, St. Petersburg  
   Church of the Redeemer, Sarasota  
10.  
11.  
12.  
13.  

Election H
University of the South Trustee
Elect One Lay Person
1. Mr. Gregory A. Hearing
   St. John, Tampa
2. Mr. David R. McCallister
   St. Catherine of Alexandria, Temple Terrace
3. ____________________________
4. ____________________________
5. ____________________________
6. ____________________________
7. ____________________________

Election I
University of the South Trustee
Elect One Presbyter
1. The Rev. Robert B. Crow
   St. Anne of Grace, Seminole
2. The Rev. Richard T. Earle III
   St. Vincent, St. Petersburg
3. ____________________________
4. ____________________________
5. ____________________________
6. ____________________________
7. ____________________________

Clergy Spouse Association
Lunch on Saturday
An important part of the convention is the annual Clergy Spouse Association lunch, held on the Saturday of convention. In addition, the Clergy Spouse Association, an organization that supports the spouses of priests and deacons, will have a table in the Ministry Fair hall. Pictured here, Susan O’Carroll and Shane McCook.

Lay Leadership
A key part of convention is the gathering of our laity, both at the ministry fair and convention. Pictured here is the late Jody Tiffany, at podium, who spoke each year at convention on behalf of Episcopal Relief and Development. Behind her is Maureen Belote, a fellow diocesan ERD coordinator who retired this year. Read more reports of this vital work on page 58.
Resolution 2019 –#1

Resolution to Amend Article III “Of the Annual Diocesan Convention”

of the Constitution of the Episcopal Diocese of Southwest Florida

Offered by the Committee on Constitution and Canons, voting on the 19th day of July, 2019.

BE IT RESOLVED, by the 51st Annual Convention of the Diocese of Southwest Florida meeting at Punta Gorda on the 12th day of October, 2019:

That Article III “Of the Annual Diocesan Convention” of the Constitution of the Episcopal Diocese of Southwest Florida be amended as follows:

The members of the Diocese shall be all congregations in union with the Episcopal Church in the above-described area and shall be represented solely by the delegates to the Annual Convention of the Diocese.

The Convention of the Church of this Diocese shall assemble annually at such time and place as shall have been appointed by the preceding Annual Convention; but, for sufficient cause, the Ecclesiastical Authority of the Diocese shall have power to change the time or place, or both, as emergency may require; provided however, that at least ten days’ notice of such change shall be given to every Vestry and Bishop’s Committee, and to the Minister in charge of every Congregation, and to every member of the Clergy canonically resident in the Diocese. Reasonable notice thereof shall be given to all Clergy and Congregations entitled to representation.

Explanation:

The Constitution and Canons Committee believes that there may be circumstances, not qualified as an “emergency” by which the date and location of the Annual Convention may need to be changed by the Ecclesiastical Authority, upon reasonable notice.

Resolutions Committee Review: The Resolutions Committee has reviewed the proposed resolution. The committee confirms that it has been validly submitted to Convention and reports it to the floor without comment.
Resolution 2019 – #2

To Amend Article V “Of the Members of the Convention”

of the Constitution of the Episcopal Diocese of Southwest Florida

Offered by the Committee on Constitution and Canons, voting on the 19th day of July, 2019.

BE IT RESOLVED, by the 51st Annual Convention of the Diocese of Southwest Florida meeting at Punta Gorda on the 12th day of October, 2019:

That Article V “Of the Members of the Convention” of the Constitution of the Episcopal Diocese of Southwest Florida be amended as follows:

Section 1. The convention shall be composed of the Bishops, together with the other members of the Clergy, and Lay Persons of the Diocese, as provided for in the following sections of this Article.

[No change to Section 1.]

Section 2. All members of the Clergy in regular standing in this Diocese, shall be entitled to a seat and vote in the Convention; provided, that they shall have been admitted, and at the time of the Convention shall be actually settled as Rector, or Assistant Minister of some Congregation in union with the Convention of this Diocese, or shall be a Canon, Archdeacon, Vicar, Missionary, Chaplain or Church Army Officer in charge of a congregation under the direction of the Bishop, or shall be engaged as an instructor of youth in some institution of learning under the control of the Church, within the Diocese, or shall be a Chaplain on active duty in the Armed Forces of the United States of America. All other members of the Clergy canonically resident in this Diocese shall be entitled to a seat and voice but without a vote. Each canonically resident presbyter who serves as Bishop, Rector, Assistant or Priest in Charge in a congregation or other community of faith shall have seat, voice and vote. Each canonically resident member of the diaconate who is licensed by the Ecclesiastical Authority and serving under a written letter of agreement approved by the Ecclesiastical Authority shall have seat, voice and vote. Every member of the Diocesan Council who is not otherwise a member of the Convention, and every member of the Standing Committee who is not otherwise a member of the Convention, shall be entitled to seat, voice and vote. All other members of the Clergy canonically resident in this Diocese shall be entitled to a seat and voice but without a vote.

Section 3. In the year of the General Convention and the year following the General Convention every Deputy and Alternate Deputy to General Convention who is not otherwise a member of the Convention shall be entitled to seat, voice and vote.
Section 34. Every Parish in union with the Convention of this Diocese shall be entitled as provided by Canon to be represented by the three Lay Delegates.

[No change to existing Section 3, now renumbered.]

Section 45. Every canonically organized Mission of the Diocese shall be entitled as provided by Canon to be represented by two Lay Delegates.

[No change to existing Section 4, now renumbered.]

Section 56. Lay Delegates shall be chosen by the Vestry or Bishop’s Committee of each Congregation in the Diocese. If the respective Vestry or Bishop’s Committee fails to act, then election shall be by such Congregation duly convened. Delegates shall be canonical electors of the Congregation which they severally represent; but no candidate for Holy Orders shall be elected as a Lay Delegate to any Convention.

[No change to existing Section 5, now renumbered.]

Explanation:

Existing Article V defines as members of the Convention persons who are “in regular standing in this Diocese”; “actually settled”; “Archdeacon”; “missionary” and those who “shall be engaged as an instructor of youth in some institution”. The Committee recommends that membership in the Convention be more clearly defined and be restricted, as to clergy, to those actively engaged in ministry within the Diocese.

This proposal also provides that members of the Diocesan Council, Standing Committee and lay delegates to General Convention are members of the Diocesan Convention and shall be entitled to seat, voice and vote.

Resolutions Committee Review: The Resolutions Committee has reviewed the proposed resolution. The committee confirms that it has been validly submitted to Convention and reports it to the floor without comment.
Resolution 2019–#3

To Amend Canon VII Section 2 “Bylaws”

of the Canons of the Episcopal Diocese of Southwest Florida

Offered by the Committee on Constitution and Canons, voting on the 19th day of July, 2019.

BE IT RESOLVED, by the 51st Annual Convention of the Diocese of Southwest Florida meeting at Punta Gorda on the 12th day of October, 2019:

That Canon VII Section 2 “Bylaws” of the Canons of the Episcopal Diocese of Southwest Florida be amended as follows:

Canon VII Section 2. Bylaws.

a. A Congregation may adopt bylaws for the governance of the affairs of the Congregation. Bylaws that conflict with the provisions of the Constitution or Canons of the Episcopal Church shall be void. Unless these Canons grant specific authority to the Congregation to adopt an alternative provision, bylaws that conflict with the provisions of the Constitution or Canons of this Diocese shall be void. Should any of the bylaws of a Congregation be found or declared to be invalid or ineffective for any reason, only the provisions specifically found or declared to be invalid or ineffective shall cease to be operative, and the remaining terms and provisions of the bylaws shall continue in full force and effect.

Explanation:

The Constitution and Canons Committee believes the Canons exhibit a clear expectation that congregations shall have bylaws (see, e.g., Canon VII, Sections 1-4 and Canons I, Section 5, VI, Section 4 and IX, Subsection 6e.1.), and that, accordingly, the mandatory “shall” is appropriate rather than the permissive “may.”

Resolutions Committee Review: The Resolutions Committee has reviewed the proposed resolution. The committee confirms that it has been validly submitted to Convention and reports it to the floor without comment.
Resolution 2019–#4

To Amend Section 1.f of Canon I, “Members of Diocesan Convention”

of the Canons of the Episcopal Diocese of Southwest Florida

Offered by the Committee on Constitution and Canons, voting on the 16th day of August, 2019.

BE IT RESOLVED, by the 51st Annual Convention of the Diocese of Southwest Florida meeting at Punta Gorda on the 12th day of October, 2019:

That Canon I, Section 1.f. of the Canons of the Episcopal Diocese of Southwest Florida be amended as follows:

CANON I

Members of Diocesan Convention

Section 1.

f. Clergy Members of Convention who are deacons who have an assignment from the Bishop to serve a Congregation that is a member of this Diocese, who have entered into a written agreement, approved by the Bishop, with that Congregation, and who are not retired from active service, are Members of Convention with the right to seat, voice and vote.

Explanation:

The Constitution and Canons Committee recommends this change to be consistent with the recommended amendment to Canon V sought by Resolution 2019–#2. It is unlikely that a deacon assigned to a Congregation in this Diocese with a written agreement approved by the Bishop could be considered “retired.” In any event, as stated in the “Explanation” to Resolution 2019–#2, the Committee recommends “that membership in the Convention be more clearly defined and be restricted, as to clergy, to those actively engaged in ministry within the Diocese.”

Resolutions Committee Review: The Resolutions Committee has reviewed the proposed resolution. The committee confirms that it has been validly submitted to Convention and reports it to the floor without comment.
2020 Diocesan Budget

Episcopal Diocese of Southwest Florida
The 2020 Diocesan Budget Process and Reporting

This diocesan budget is the product of a deliberate process of conversations that include the diocesan community through Diocesan Council, committees, leaders and focus groups. While truly a year-long process, the budgeting work formally begins in June and continues through final presentation in October.

* The Office of the Bishop staff communicated with a variety of diocesan leaders regarding individual line items.
* The Endowment Fund Board determined the 2020 spending rule per the Endowment Fund Policy. Funds available for distribution are determined by using a total return principle. The approved spending rate for 2020 is 4.8% of the three-year rolling average market value of the endowment account ending in June 2019.
* The Bishop Compensation Subcommittee reviewed the compensation of the Bishop.
* The Finance Committee reviewed draft budgets in their June and August meetings, and recommend the final draft to Diocesan Council.
* Diocesan Council approved the final budget at their August 17, 2019 meeting.
* The budget was presented to convention delegates and clergy at the Fall Deanery Convocations in September.

Within this budget presentation are the following:

A. 2020 Diocesan Operating Budget - Summary (one page summary of the operating budget)
B. 2020 Diocesan Operating Budget - Detail (detailed operating budget)
C. 2020 DaySpring Episcopal Center Budget
D. Endowment Spending Rule Analysis (explanation of endowment spending rule calculation)
E. Designated Funds (summary of the activity of the council-designated funds)
F. Restricted Funds (summary of the activity of the individual donor-restricted funds)
G. Apportionment Schedule (detailed schedule of 2020 apportionment amounts which fund the diocesan budget, by church)
H. Apportionment Calculation (detailed definition of the apportionment calculation in our diocese)
I. Parochial Report Analysis (comparison of parochial report totals for 2017 and 2018)
## Episcopal Diocese of Southwest Florida
### 2020 Diocesan Operating Budget Summary

<table>
<thead>
<tr>
<th></th>
<th>2019 Budget</th>
<th>2020 Budget</th>
<th>2019-20 Change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td><strong>INCOME</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operating Apportionment</td>
<td>$3,117,236</td>
<td>$3,137,800</td>
<td>$20,564 1%</td>
</tr>
<tr>
<td>Investment Income</td>
<td>-</td>
<td>-</td>
<td>- 0%</td>
</tr>
<tr>
<td>Income Released from Restricted/Designated Funds-General (a)</td>
<td>$68,068</td>
<td>$81,113</td>
<td>$13,045 19%</td>
</tr>
<tr>
<td><strong>TOTAL INCOME</strong></td>
<td>$3,185,304</td>
<td>$3,218,913</td>
<td>$33,609 1%</td>
</tr>
<tr>
<td><strong>EXPENSES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Congregational Support and Development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Seminarian Transition</td>
<td>$7,580</td>
<td>$4,723</td>
<td>$(2,857) -38%</td>
</tr>
<tr>
<td>Congregation Leadership</td>
<td>$39,000</td>
<td>$39,000</td>
<td>- 0%</td>
</tr>
<tr>
<td>Cultural &amp; Ethnic Ministries</td>
<td>$150,000</td>
<td>$150,000</td>
<td>- 0%</td>
</tr>
<tr>
<td>Mission and Congregational Development</td>
<td>$85,887</td>
<td>$141,164</td>
<td>$55,277 64%</td>
</tr>
<tr>
<td>Uncollectable Apportionment Allowance</td>
<td>$155,862</td>
<td>$156,890</td>
<td>$1,028 1%</td>
</tr>
<tr>
<td><strong>Total Congregational Support and Development</strong></td>
<td>$438,329</td>
<td>$491,777</td>
<td>$53,448 12%</td>
</tr>
<tr>
<td>Ministry and Programming</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ministry Development</td>
<td>$27,902</td>
<td>$9,258</td>
<td>$(18,644) -67%</td>
</tr>
<tr>
<td>Recovery Ministries</td>
<td>$13,800</td>
<td>$13,800</td>
<td>- 0%</td>
</tr>
<tr>
<td>DaySpring Program Development</td>
<td>$100,000</td>
<td>$105,000</td>
<td>$5,000 5%</td>
</tr>
<tr>
<td>Youth, Young Adult and Families</td>
<td>$140,000</td>
<td>$150,000</td>
<td>$10,000 7%</td>
</tr>
<tr>
<td>Campus Ministry</td>
<td>$64,601</td>
<td>$64,351</td>
<td>$(250) 0%</td>
</tr>
<tr>
<td>Beyond Diocese</td>
<td>$558,307</td>
<td>$571,101</td>
<td>$12,794 2%</td>
</tr>
<tr>
<td><strong>Total Ministry</strong></td>
<td>$904,610</td>
<td>$913,510</td>
<td>$8,900 1%</td>
</tr>
<tr>
<td>Administration</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>$308,933</td>
<td>$316,606</td>
<td>$7,673 2%</td>
</tr>
<tr>
<td>Cemetery</td>
<td>$5,476</td>
<td>$4,993</td>
<td>$(483) -9%</td>
</tr>
<tr>
<td>Bishop Discretionary</td>
<td>-</td>
<td>-</td>
<td>- 0%</td>
</tr>
<tr>
<td>Investments</td>
<td>-</td>
<td>-</td>
<td>- 0%</td>
</tr>
<tr>
<td>Personnel</td>
<td>$1,522,748</td>
<td>$1,492,027</td>
<td>$(30,721) -2%</td>
</tr>
<tr>
<td>Retired Personnel</td>
<td>$5,208</td>
<td>-</td>
<td>$(5,208) -100%</td>
</tr>
<tr>
<td><strong>Total Administration</strong></td>
<td>$1,842,365</td>
<td>$1,813,626</td>
<td>$(28,739) -2%</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td>$3,185,304</td>
<td>$3,218,913</td>
<td>$33,609 1%</td>
</tr>
<tr>
<td><strong>NET TOTAL OPERATING</strong></td>
<td>$(0)</td>
<td>$(0)</td>
<td>$(0)</td>
</tr>
</tbody>
</table>

**Notes**

a. Income released from restricted or designated accounts that is restricted to a particular expense category ($410,043) is presented as an offset to the expense (see detailed budget).
## Episcopal Diocese of Southwest Florida
### 2020 Diocesan Operating Budget Details

<table>
<thead>
<tr>
<th>Line</th>
<th>Accounts</th>
<th>2019 Budget</th>
<th>2020 Budget</th>
<th>2019-20 Change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2019-20</td>
<td>$</td>
<td>%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Budget</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>INCOME</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Apportionment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>570000 - Operating Apportionment</td>
<td>$3,117,236</td>
<td>$3,137,800</td>
<td>-20,564  1%</td>
</tr>
<tr>
<td>4</td>
<td>Total Apportionment</td>
<td>$3,117,236</td>
<td>$3,137,800</td>
<td>-20,564  1%</td>
</tr>
<tr>
<td>5</td>
<td>Miscellaneous Income</td>
<td>$</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>570200 - Misc Interest Income</td>
<td>$-</td>
<td>$-</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>573001 - Grant Income</td>
<td>$-</td>
<td>-</td>
<td>NA</td>
</tr>
<tr>
<td>8</td>
<td>Total Miscellaneous Income</td>
<td>$-</td>
<td>$-</td>
<td>NA</td>
</tr>
<tr>
<td>9</td>
<td>Transfers of Released Income (a)</td>
<td>$</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>572000 - Released from Restricted Funds-General</td>
<td>$68,068</td>
<td>$81,113</td>
<td>$13,045  19%</td>
</tr>
<tr>
<td>11</td>
<td>Total Transfers</td>
<td>$68,068</td>
<td>$81,113</td>
<td>$13,045  19%</td>
</tr>
<tr>
<td>12</td>
<td>TOTAL INCOME</td>
<td>$3,185,304</td>
<td>$3,218,913</td>
<td>$33,609  1%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>EXPENSES</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Congregational Support and Development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Seminarian Transition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>572002 - Released from Restricted Funds-Seminarian Transition</td>
<td>$(14,920)</td>
<td>$(17,777)</td>
<td>$(2,857) 19%</td>
</tr>
<tr>
<td>18</td>
<td>582180 - Seminarian Transition/Deployment</td>
<td>$22,500</td>
<td>$22,500</td>
<td>0%</td>
</tr>
<tr>
<td>19</td>
<td>Total Seminarian Transition</td>
<td>$7,580</td>
<td>$4,723</td>
<td>$(2,857) -38%</td>
</tr>
<tr>
<td>20</td>
<td>Congregation Leadership</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>580492 - Congregation Education</td>
<td>$21,000</td>
<td>$21,000</td>
<td>0%</td>
</tr>
<tr>
<td>22</td>
<td>583350 - Deanery Support</td>
<td>$7,000</td>
<td>$7,000</td>
<td>0%</td>
</tr>
<tr>
<td>23</td>
<td>583340 - Meetings</td>
<td>$11,000</td>
<td>$11,000</td>
<td>0%</td>
</tr>
<tr>
<td>24</td>
<td>Total Congregation Leadership</td>
<td>$39,000</td>
<td>$39,000</td>
<td>0%</td>
</tr>
<tr>
<td>25</td>
<td>Cultural &amp; Ethnic Ministries</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>582194 - Cultural &amp; Ethnic Ministries</td>
<td>$150,000</td>
<td>$150,000</td>
<td>0%</td>
</tr>
<tr>
<td>27</td>
<td>Total Cultural &amp; Ethnic Ministries</td>
<td>$150,000</td>
<td>$150,000</td>
<td>0%</td>
</tr>
<tr>
<td>28</td>
<td>Mission and Congregational Development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>572003 - Released from Restricted Funds-Mission</td>
<td>$(52,162)</td>
<td>$(62,150)</td>
<td>$(10,988) 19%</td>
</tr>
<tr>
<td>30</td>
<td>572001 - Released from Designated Funds-Mission</td>
<td>$(76,951)</td>
<td>$(91,686)</td>
<td>$(14,735) 19%</td>
</tr>
<tr>
<td>31</td>
<td>580493 - Congregation Expertise Support</td>
<td>$45,000</td>
<td>$45,000</td>
<td>0%</td>
</tr>
<tr>
<td>32</td>
<td>581020 - Congregation Aid</td>
<td>$60,000</td>
<td>$75,000</td>
<td>25%</td>
</tr>
<tr>
<td>33</td>
<td>581021 - Congregation Growth Initiatives</td>
<td>$60,000</td>
<td>$76,000</td>
<td>25%</td>
</tr>
<tr>
<td>34</td>
<td>573910 - Church Plant Revenue-WCEC</td>
<td>$-</td>
<td>$(25,000)</td>
<td>$(25,000) NA</td>
</tr>
<tr>
<td>35</td>
<td>581265 - New Mission Investment-WCEC Church Plant</td>
<td>$40,000</td>
<td>$85,000</td>
<td>$45,000 113%</td>
</tr>
<tr>
<td>36</td>
<td>573911 - Church Plant Revenue-Parish</td>
<td>$-</td>
<td>$(12,000)</td>
<td>$(12,000) NA</td>
</tr>
<tr>
<td>37</td>
<td>581267 - New Mission Investment-Parish Church Plant</td>
<td>$10,000</td>
<td>$63,000</td>
<td>$53,000 420%</td>
</tr>
<tr>
<td>38</td>
<td>Total Mission and Congregational Development</td>
<td>$85,887</td>
<td>$141,164</td>
<td>$55,277 66%</td>
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<tr>
<td>39</td>
<td>Uncollectable Apportionment Allowance</td>
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<td>40</td>
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<td>42</td>
<td>Total Congregational Support and Development</td>
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<td>43</td>
<td>Ministry and Programming</td>
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<tr>
<td>44</td>
<td>Ministry Development</td>
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<td>46</td>
<td>582121 - School for Ministry Expense*</td>
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<td>582150 - Education for Ministry</td>
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<td>48</td>
<td>572004 - Released from Restricted Fund - Seminarian</td>
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<td>582160 - Seminarian Support</td>
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<td>580720 - Clergy Spouse Association</td>
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<td>Recovery Ministries</td>
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<td>573000 - Recovery Ministries Revenue</td>
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<td>584030 - Recovery Ministries Expense*</td>
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<tr>
<td>56</td>
<td>DaySpring Program Development</td>
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<tr>
<td>57</td>
<td>573499 - Adult Program Revenues</td>
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<td>582400 - Adult Programs Expense</td>
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51st ANNUAL CONVENTION
41
## Episcopal Diocese of Southwest Florida
### 2020 Diocesan Operating Budget Details

<table>
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<th>Line</th>
<th>Accounts</th>
<th>2019 Budget</th>
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<th>2019-20 Change</th>
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<tr>
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<td>582195 - USF Chapel Center Expenses</td>
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<td>582197 - College Ministry Personnel</td>
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<td>584010 - Episcopal Networks &amp; Travel</td>
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<td>583300 - Office Expenses</td>
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<td>583310 - Utilities</td>
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<td>583302 - Background check expense</td>
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<td>583330 - Insurance</td>
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<td>583360 - Diocesan Convention</td>
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<td>582100 - Diocesan Liturgy-Support</td>
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<td>583600 - Publication Costs</td>
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<td>583325 - Postage and Mailing Services</td>
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<td>572006 - Released from Restricted Fund - St. Barth's Cemetery</td>
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<td>599040 - St. Bartholomew's Cemetery</td>
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<td>Bishop Discretionary</td>
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<td>572005 - Released from Restricted Funds-Bishop Discretionary</td>
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<td>Investments</td>
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<td>583300 - Unrealized (Gain) Loss on Invest.</td>
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<td>Total Investments</td>
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### Episcopal Diocese of Southwest Florida
#### 2020 Diocesan Operating Budget Details

<table>
<thead>
<tr>
<th>Line</th>
<th>Accounts</th>
<th>2019 Budget</th>
<th>2020 Budget</th>
<th>2019-20 Change</th>
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</thead>
<tbody>
<tr>
<td>116</td>
<td>Personnel</td>
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<tr>
<td>117</td>
<td>The Episcopate</td>
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<tr>
<td>118</td>
<td>580100 - Bishop - Stipend</td>
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<td>119</td>
<td>580150 - Bishop - Housing</td>
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<td>580200 - Bishop - Insurance</td>
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<td>580250 - Bishop - Pension</td>
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<td>122</td>
<td>580300 - Bishop - Prof Exp</td>
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<td>580900 - Assisting Bishops - Stipend</td>
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<td>580910 - Assisting Bishops - Prof Exp</td>
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<td>Mission and Ministry</td>
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<td>127</td>
<td>583201 - Staff - M&amp;M-Compensation</td>
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<td>$299,050</td>
<td>$363,465</td>
<td>$64,415 22%</td>
</tr>
</tbody>
</table>

**Notes**

a. Total amount released from Restricted/Designated (presented alongside the expense line) $(345,637) $(410,043)

b. Total amount received as program revenue $(142,000) $(142,000)
## Episcopal Diocese of Southwest Florida
### 2020 DaySpring Episcopal Center Budget

<table>
<thead>
<tr>
<th>Line</th>
<th>2019 Budget</th>
<th>2020 Budget</th>
<th>2019-20 Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 INCOME</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Meals/Lodging</td>
<td>$1,624,347</td>
<td>$1,693,371</td>
<td>$69,024</td>
</tr>
<tr>
<td>3 Diocesan Budget</td>
<td>27%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>4 Episcopal-Other</td>
<td>3%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>5 Non-Episcopal</td>
<td>70%</td>
<td>73%</td>
<td></td>
</tr>
<tr>
<td>6 Miscellaneous</td>
<td>$32,516</td>
<td>$44,316</td>
<td>$11,800</td>
</tr>
<tr>
<td>7 DaySpring Endowment Income (a)</td>
<td>$32,268</td>
<td>$39,666</td>
<td>$7,398</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Total Revenue</td>
<td>$1,689,131</td>
<td>$1,777,353</td>
<td>$88,222</td>
</tr>
<tr>
<td>10 EXPENSES</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Food Services</td>
<td>$475,045</td>
<td>$491,820</td>
<td>$16,775</td>
</tr>
<tr>
<td>12 % of revenue</td>
<td>28%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>13 Guest Services</td>
<td>$254,645</td>
<td>$275,455</td>
<td>$20,810</td>
</tr>
<tr>
<td>14 % of revenue</td>
<td>15%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>15 Maintenance</td>
<td>$378,720</td>
<td>$402,693</td>
<td>$23,973</td>
</tr>
<tr>
<td>16 % of revenue</td>
<td>22%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>17 Administration</td>
<td>$570,516</td>
<td>$595,580</td>
<td>$25,064</td>
</tr>
<tr>
<td>18 % of revenue</td>
<td>34%</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>19 Other Expenses</td>
<td>$10,205</td>
<td>$11,805</td>
<td>$1,600</td>
</tr>
<tr>
<td>20 % of revenue</td>
<td>1%</td>
<td>1%</td>
<td></td>
</tr>
<tr>
<td>21 Total Operating Expenses</td>
<td>$1,689,131</td>
<td>$1,777,353</td>
<td>$88,222</td>
</tr>
<tr>
<td>22 Net Total Operations (Before Depreciation)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23 * Depreciation (non-cash)</td>
<td>$300,000</td>
<td>$300,000</td>
<td></td>
</tr>
<tr>
<td>24 Capital Income (b)</td>
<td>$100,000</td>
<td>$100,000</td>
<td></td>
</tr>
<tr>
<td>25 Capital Maintenance Expenses</td>
<td>$100,000</td>
<td>$100,000</td>
<td></td>
</tr>
<tr>
<td>26 Net Total Capital</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Notes:
- a. From the DaySpring Endowment per diocesan spending rule
- b. From Diocesan Budget Expense Account 583410 - DaySpring Capital Maintenance Support
Episcopal Diocese of Southwest Florida
Endowment Spending Rule Analysis 2020

<table>
<thead>
<tr>
<th>Market Value</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Endowment Fund</td>
<td>Income Fund</td>
</tr>
<tr>
<td></td>
<td>Endowments/</td>
<td>Revolving Loan Fund</td>
</tr>
<tr>
<td></td>
<td>Restricted Funds</td>
<td></td>
</tr>
<tr>
<td>2016-Q3</td>
<td>$12,241,232</td>
<td>$1,538,555</td>
</tr>
<tr>
<td>2016-Q4</td>
<td>$12,459,179</td>
<td>$1,474,130</td>
</tr>
<tr>
<td>2017-Q1</td>
<td>$13,001,754</td>
<td>$1,569,202</td>
</tr>
<tr>
<td>2017-Q2</td>
<td>$13,368,651</td>
<td>$1,550,377</td>
</tr>
<tr>
<td>2017-Q3</td>
<td>$14,329,613</td>
<td>$1,683,112</td>
</tr>
<tr>
<td>2017-Q4</td>
<td>$14,834,185</td>
<td>$1,624,226</td>
</tr>
<tr>
<td>2018-Q1</td>
<td>$14,674,305</td>
<td>$1,270,547</td>
</tr>
<tr>
<td>2018-Q2</td>
<td>$15,082,828</td>
<td>$1,335,885</td>
</tr>
<tr>
<td>2018-Q3</td>
<td>$15,874,143</td>
<td>$1,342,078</td>
</tr>
<tr>
<td>2018-Q4</td>
<td>$14,365,585</td>
<td>$1,279,947</td>
</tr>
<tr>
<td>2019-Q1</td>
<td>$16,112,976</td>
<td>$1,485,271</td>
</tr>
<tr>
<td>2019-Q2</td>
<td>$17,218,554</td>
<td>$1,512,972</td>
</tr>
</tbody>
</table>

3 Year Average as of 6/30/19 $14,463,584 $1,472,025 $15,935,609

| Spending Rate | 4.80% | NA |

| 2019 Distribution* | $694,252 | NA | $694,252 |
| Monthly            | $57,854  | NA | $57,854  |

Explanation:
The percentage of the FUND made available for distribution shall be determined each year by the board and will normally fall in the range of three to five percent. In so doing, market performance of the portfolio will be an important consideration. It will be the goal of the board to grow, or at least maintain, the purchasing power of the FUND taking inflationary effects into account.

Funds available for distribution are determined by using a total return principle, i.e., return derived from dividends and interest as well as realized and unrealized capital gains. The funds available for distribution during any one year will be limited to a percentage of the market value of the corpus that is based on a three-year rolling average, with measures taken at the end of each of the preceding twelve quarters.

The approved spending rate for 2020 is 4.8% of the three-year rolling average market value of the endowment ending in June 2019. This rate is justified by considering the 3-year average return of 7.92%, 3-year average inflation of 2%, and endowment management fees of .59%, and by considering the conservative spending rates of the prior five years.

This spending rule releases a total of $694,252 from restricted and designated invested funds for use in 2020. Of this total, $213,090 is the distribution for the 31 congregation and organization participants of the Diocesan Endowment Management Program (DEMP). The calculated funds available for distribution are included in the diocesan budget for 2020 and distributed monthly per the request of the DEMP participants.
Episcopal Diocese of Southwest Florida
2020 Budget - Designated Funds

These are funds grouped according to designations approved by Diocesan Council.

<table>
<thead>
<tr>
<th>Endowments</th>
<th>6/30/2019 Balance</th>
<th>Rate</th>
<th>Budgeted 2020 Distribution</th>
<th>Income Released to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>DaySpring Endowment</td>
<td>$979,137</td>
<td>4.8% (d)</td>
<td>$39,666</td>
<td>DaySpring</td>
</tr>
<tr>
<td>Episcopal Charities Endowment</td>
<td>$890,218</td>
<td>4.8% (d)</td>
<td>$36,064</td>
<td>EC Grants</td>
</tr>
<tr>
<td><strong>Total Endowments</strong></td>
<td><strong>$1,869,355</strong></td>
<td></td>
<td><strong>$75,730</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mission Fund</th>
<th>6/30/2019 Balance</th>
<th>Rate</th>
<th>Budgeted 2020 Distribution</th>
<th>Income Released to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission Fund</td>
<td>$2,263,232</td>
<td>4.8% (d)</td>
<td>$91,686</td>
<td>Operating Budget</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Revolving Loan Fund</th>
<th>6/30/2019 Balance</th>
<th>Rate</th>
<th>Budgeted 2020 Distribution</th>
<th>Income Released to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes Receivable</td>
<td>$2,257,771</td>
<td>3%-4.25%</td>
<td>$67,733</td>
<td>Reinvested into RLF Fund</td>
</tr>
<tr>
<td>Cash Available</td>
<td>$1,502,815</td>
<td>1.30%</td>
<td>$19,537</td>
<td>Reinvested into RLF Fund</td>
</tr>
<tr>
<td><strong>Total Revolving Loan Fund</strong></td>
<td><strong>$3,760,586</strong></td>
<td></td>
<td><strong>$87,270</strong></td>
<td></td>
</tr>
</tbody>
</table>

| Total Designated Funds          | $7,893,173        |         | $254,685                  |                     |

**Notes**

a. Total to Operating Budget $91,686
b. Total to Designated Funds $87,270
c. Total Out to Third Party $75,730

d. Approved spending rule: 4.8% of the trailing 3 year average balance
### Episcopal Diocese of Southwest Florida
#### 2020 Budget - Restricted Funds

These are funds legally restricted by the donor's wishes.

<table>
<thead>
<tr>
<th>Restriction Category / Fund Name</th>
<th>6/30/2019 Balance</th>
<th>Rate</th>
<th>Budgeted 2020 Distribution</th>
<th>Income Released to:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Congregation Loans</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flagler (St Mary, Tampa, Available funds)</td>
<td>$ 130,977</td>
<td>0.00%</td>
<td>$ -</td>
<td></td>
</tr>
<tr>
<td>Rev. Cap.Loan (St Mark, Tampa)</td>
<td>$ 935,396</td>
<td>3.00%</td>
<td>$ 28,062</td>
<td>Revolving Loan Fund</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$ 1,066,373</td>
<td></td>
<td>$ 28,062</td>
<td></td>
</tr>
<tr>
<td><strong>Bishop Discretionary</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tulane (part A-St Mark Tampa loan)</td>
<td>$ 315,034</td>
<td>3.00%</td>
<td>$ 9,451</td>
<td></td>
</tr>
<tr>
<td>Tulane (part B-Endowment)</td>
<td>$ 277,689</td>
<td>4.8% (d)</td>
<td>$ 11,249</td>
<td>Operating Budget</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$ 592,722</td>
<td></td>
<td>$ 20,700</td>
<td>Operating Budget</td>
</tr>
<tr>
<td><strong>Underprivileged</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Smith</td>
<td>$ 139,144</td>
<td>4.8% (d)</td>
<td>$ 5,637</td>
<td>Operating Budget</td>
</tr>
<tr>
<td><strong>Missions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foster</td>
<td>$ 19,714</td>
<td>4.8% (d)</td>
<td>$ 799</td>
<td></td>
</tr>
<tr>
<td>Plumley</td>
<td>$ 13,285</td>
<td>4.8% (d)</td>
<td>$ 538</td>
<td></td>
</tr>
<tr>
<td>Leach</td>
<td>$ 838,974</td>
<td>4.8% (d)</td>
<td>$ 33,988</td>
<td></td>
</tr>
<tr>
<td>Stemaker</td>
<td>$ 638,107</td>
<td>4.8% (d)</td>
<td>$ 25,850</td>
<td></td>
</tr>
<tr>
<td>Evans 50%</td>
<td>$ 24,067</td>
<td>4.8% (d)</td>
<td>$ 975</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$ 1,534,147</td>
<td></td>
<td>$ 62,150</td>
<td>Operating Budget</td>
</tr>
<tr>
<td><strong>Theological Education</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lindsey</td>
<td>$ 534,557</td>
<td>4.8% (d)</td>
<td>$ 21,666</td>
<td></td>
</tr>
<tr>
<td>Evans 50%</td>
<td>$ 24,067</td>
<td>4.8% (d)</td>
<td>$ 975</td>
<td></td>
</tr>
<tr>
<td>Greene</td>
<td>$ 208,920</td>
<td>4.8% (d)</td>
<td>$ 8,464</td>
<td></td>
</tr>
<tr>
<td>Mochino</td>
<td>$ 131,694</td>
<td>4.8% (d)</td>
<td>$ 5,335</td>
<td></td>
</tr>
<tr>
<td>Hall</td>
<td>$ 50,675</td>
<td>4.8% (d)</td>
<td>$ 2,053</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$ 949,914</td>
<td></td>
<td>$ 38,482</td>
<td>Operating Budget</td>
</tr>
<tr>
<td><strong>College Chaplaincy</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kiely SCF Chaplaincy Fund</td>
<td>$ 38,334</td>
<td>4.8% (d)</td>
<td>$ 1,553</td>
<td>Operating Budget</td>
</tr>
<tr>
<td><strong>Benefit of elderly</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Archambault</td>
<td>$ 1,098,843</td>
<td>4.8% (d)</td>
<td>$ 44,515</td>
<td></td>
</tr>
<tr>
<td>Ross</td>
<td>$ 1,211,033</td>
<td>4.8% (d)</td>
<td>$ 49,060</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$ 2,309,877</td>
<td></td>
<td>$ 93,576</td>
<td>Operating Budget</td>
</tr>
<tr>
<td><strong>Cemetery</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>St Bartholomew Cemetery</td>
<td>$ 74,225</td>
<td>4.8% (d)</td>
<td>$ 3,007</td>
<td>Operating Budget</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hubbs</td>
<td>$ 438,807</td>
<td>4.8% (d)</td>
<td>$ 17,777</td>
<td></td>
</tr>
<tr>
<td>Johnson 50%</td>
<td>$ 119,476</td>
<td>4.8% (d)</td>
<td>$ 4,840</td>
<td></td>
</tr>
<tr>
<td>Blacktop</td>
<td>$ 32,652</td>
<td>4.8% (d)</td>
<td>$ 1,323</td>
<td></td>
</tr>
<tr>
<td>Werk</td>
<td>$ 1,684,489</td>
<td>4.8% (d)</td>
<td>$ 68,241</td>
<td></td>
</tr>
<tr>
<td>SWFL Endowment-Unrestricted</td>
<td>$ 26,471</td>
<td>4.8% (d)</td>
<td>$ 1,072</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$ 2,301,895</td>
<td></td>
<td>$ 93,252</td>
<td>Operating Budget</td>
</tr>
<tr>
<td><strong>For Distribution</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Johnson 50%</td>
<td>$ 119,476</td>
<td>4.8% (d)</td>
<td>$ 4,840</td>
<td>Church of the Ascension</td>
</tr>
<tr>
<td>Dunning</td>
<td>-</td>
<td>Fixed</td>
<td>$ 1,500</td>
<td>To Episcopal Charities Grants</td>
</tr>
<tr>
<td><strong>TotalRestricted Funds</strong></td>
<td>$ 9,126,106</td>
<td></td>
<td>$ 352,759</td>
<td></td>
</tr>
<tr>
<td><strong>Other Diocesan Organization Endowments</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ECW-Sarah Howell Fund</td>
<td>$ 124,785</td>
<td>4.8% (d)</td>
<td>$ 5,055</td>
<td>Outreach</td>
</tr>
<tr>
<td>CSA-Mary Ellen Smith Endowment</td>
<td>$ 10,910</td>
<td>4.8% (d)</td>
<td>$ 442</td>
<td>Outreach</td>
</tr>
</tbody>
</table>

### Beneficial Interest in Bishop Gray Retirement Foundation

The Bishop Gray Retirement Foundation, Inc. is a not-for-profit Florida corporation, organized to provide retirement support for the aged under the auspices and control of the Central, Southwest and Southeast Florida Diocese of the Protestant Episcopal Church currently through a scholarship program which is intended to help eligible elderly Episcopalians from the three dioceses obtain quality housing and healthcare. The Diocese elects four members to the governing board to the Bishop Gray Retirement Foundation, Inc. At 12/31/2018, the total assets of the Foundation were $11,558,661.
### Episcopal Diocese of Southwest Florida
#### 2020 Parochial Report

#### 2020 Apportionment

<table>
<thead>
<tr>
<th>City</th>
<th>Church</th>
<th>Normal Operating Income</th>
<th>Funds Received for Capital Projects</th>
<th>Total Subject to Apportionment</th>
<th>Operating @10%</th>
<th>Capital @10%</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arcadia</td>
<td>St. Edmund</td>
<td>$108,318 $</td>
<td>$10,000 $</td>
<td>$118,318 $</td>
<td>$10,832 $</td>
<td>$1,000 $</td>
<td>$11,831.80</td>
</tr>
<tr>
<td>Boca Grande</td>
<td>St. Andrew</td>
<td>$529,617 $</td>
<td>- $</td>
<td>$529,617 $</td>
<td>$52,962 $</td>
<td>- $</td>
<td>$52,961.70</td>
</tr>
<tr>
<td>Bonita Springs</td>
<td>St. Mary</td>
<td>$772,451 $</td>
<td>$169,000 $</td>
<td>$941,451 $</td>
<td>$77,245 $</td>
<td>$16,900 $</td>
<td>$94,145.10</td>
</tr>
<tr>
<td>Bradenton</td>
<td>Christ Church</td>
<td>$797,373 $</td>
<td>62 $</td>
<td>$797,435 $</td>
<td>$79,737 $</td>
<td>6 $</td>
<td>$79,743.50</td>
</tr>
<tr>
<td>Bradenton</td>
<td>St. George</td>
<td>$175,095 $</td>
<td>$37,451 $</td>
<td>$212,546 $</td>
<td>$17,510 $</td>
<td>$3,745 $</td>
<td>$21,254.60</td>
</tr>
<tr>
<td>Brooksville</td>
<td>St. John</td>
<td>$90,036 $</td>
<td>- $</td>
<td>$90,036 $</td>
<td>$9,004 $</td>
<td>- $</td>
<td>$9,003.60</td>
</tr>
<tr>
<td>Cape Coral</td>
<td>Epiphany</td>
<td>$277,877 $</td>
<td>$39,656 $</td>
<td>$317,533 $</td>
<td>$27,788 $</td>
<td>$3,966 $</td>
<td>$31,753.30</td>
</tr>
<tr>
<td>Clearwater</td>
<td>Ascension</td>
<td>$1,214,523 $</td>
<td>$71,930 $</td>
<td>$1,286,453 $</td>
<td>$121,452 $</td>
<td>$7,193 $</td>
<td>$128,645.30</td>
</tr>
<tr>
<td>Cleanwater</td>
<td>Good Samaritan</td>
<td>$160,447 $</td>
<td>- $</td>
<td>$160,447 $</td>
<td>$16,045 $</td>
<td>- $</td>
<td>$16,044.70</td>
</tr>
<tr>
<td>Clearwater</td>
<td>Holy Trinity</td>
<td>$387,476 $</td>
<td>3,340 $</td>
<td>$390,816 $</td>
<td>$38,748 $</td>
<td>334 $</td>
<td>$39,081.80</td>
</tr>
<tr>
<td>Clearwater</td>
<td>St. John</td>
<td>$346,980 $</td>
<td>4,074 $</td>
<td>$351,054 $</td>
<td>$34,698 $</td>
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<td>Iona-Hope</td>
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<td>Lamb of God</td>
<td>$250,777 $</td>
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<td>$270,009 $</td>
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<td>$1,923 $</td>
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<td>St. Luke</td>
<td>$512,902 $</td>
<td>- $</td>
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<td>$51,290 $</td>
<td>- $</td>
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<tr>
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<td>St. Raphael</td>
<td>$158,566 $</td>
<td>92,275 $</td>
<td>$250,841 $</td>
<td>$15,857 $</td>
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<td>Annunciation</td>
<td>$298,632 $</td>
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<td>$298,632 $</td>
<td>$29,863 $</td>
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<td>St. Martin</td>
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<td>- $</td>
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<td>$9,001 $</td>
<td>- $</td>
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<tr>
<td>Indian Rocks Bch</td>
<td>Calvary</td>
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<td>- $</td>
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<td>- $</td>
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<td>14,593 $</td>
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<td>$29,668 $</td>
<td>$1,459 $</td>
<td>$31,127.20</td>
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<td>Resurrection</td>
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<td>- $</td>
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<td>- $</td>
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<td>Lehigh Acres</td>
<td>St. Anselm</td>
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<td>197 $</td>
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<td>$35,983 $</td>
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<td>St. John</td>
<td>$687,493 $</td>
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<td>$687,493 $</td>
<td>$68,749 $</td>
<td>- $</td>
<td>$68,749.30</td>
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<td>St. Monica</td>
<td>$454,694 $</td>
<td>14,643 $</td>
<td>$469,337 $</td>
<td>$45,469 $</td>
<td>$1,464 $</td>
<td>$46,933.70</td>
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<tr>
<td>Naples</td>
<td>St. Paul</td>
<td>$212,424 $</td>
<td>- $</td>
<td>$212,424 $</td>
<td>$21,242 $</td>
<td>- $</td>
<td>$21,242.00</td>
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<tr>
<td>Naples</td>
<td>Trinity-by-the-Cove</td>
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<td>1,153,346 $</td>
<td>$3,001,793 $</td>
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<td>New Port Richey</td>
<td>St. Stephen</td>
<td>$183,452 $</td>
<td>1,371 $</td>
<td>$184,823 $</td>
<td>$18,345 $</td>
<td>$137 $</td>
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<td>All Souls</td>
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<td>St. Nathaniel</td>
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<td>$155,807 $</td>
<td>$13,410 $</td>
<td>$2,171 $</td>
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<tr>
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<td>Holy Spirit</td>
<td>$165,488 $</td>
<td>2,000 $</td>
<td>$167,488 $</td>
<td>$16,548 $</td>
<td>$200 $</td>
<td>$16,748.00</td>
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<td>Palm Harbor</td>
<td>St. Alfred</td>
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<td>41,480 $</td>
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<td>Palmetto</td>
<td>St. Mary</td>
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<td>$1,281 $</td>
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<tr>
<td>Pinellas Park</td>
<td>St. Giles</td>
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<td>2,281 $</td>
<td>$154,873 $</td>
<td>$15,259 $</td>
<td>$228 $</td>
<td>$15,487.30</td>
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<td>St. Peter</td>
<td>$253,294 $</td>
<td>108,019 $</td>
<td>$361,313 $</td>
<td>$25,329 $</td>
<td>$10,802 $</td>
<td>$36,131.30</td>
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</tbody>
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**Note:** Total values include an @10% Capital Subject to Apportionment and an @10% Operating Subject to Apportionment.
## Episcopal Diocese of Southwest Florida
### 2020 Apportionment Schedule

#### 2018 Parochial Report

<table>
<thead>
<tr>
<th>City</th>
<th>Church</th>
<th>Funds Received for Capital Projects</th>
<th>Total Subject to Apportionment</th>
<th>Operating @10%</th>
<th>Capital @10%</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Port Charlotte</td>
<td>St. James</td>
<td>$254,256</td>
<td>$15,638</td>
<td>$269,894</td>
<td>$25,426</td>
<td>$26,989.40</td>
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<td>Punta Gorda</td>
<td>Good Shepherd</td>
<td>$373,946</td>
<td>-</td>
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<td>$37,395</td>
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<tr>
<td>Safety Harbor</td>
<td>Holy Spirit</td>
<td>$209,885</td>
<td>$2,516</td>
<td>$212,401</td>
<td>$20,989</td>
<td>$21,240.10</td>
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<tr>
<td>Sanibel</td>
<td>St. Michael &amp; All Angels</td>
<td>$921,953</td>
<td>$30,000</td>
<td>$951,953</td>
<td>$92,196</td>
<td>$92,195.30</td>
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<tr>
<td>Sarasota</td>
<td>Nativity</td>
<td>$302,862</td>
<td>$7,758</td>
<td>$310,620</td>
<td>$30,286</td>
<td>$31,062.00</td>
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<td>Redeemer</td>
<td>$2,399,878</td>
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<td>-</td>
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<td>$22,622</td>
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<td>St. Anne of Grace</td>
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<td>-</td>
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<td>St. Andrew</td>
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<td>3,311</td>
<td>$366,781</td>
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<tr>
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<td>St. John</td>
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<td>$2,578</td>
<td>$103,275</td>
<td>$10,070</td>
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<td>St. Pete Beach</td>
<td>St. Alban</td>
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<td>$17,706</td>
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<td>St. Petersburg</td>
<td>St. Augustine</td>
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<td>St. Bede</td>
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<td>$10,310</td>
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<td>-</td>
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<tr>
<td>St. Petersburg</td>
<td>St. Peter</td>
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<td>St. Petersburg</td>
<td>St. Thomas</td>
<td>$717,836</td>
<td>-</td>
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<td>St. Petersburg</td>
<td>St. Vincent</td>
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<td>$25,386.20</td>
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<tr>
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<td>St. Andrew</td>
<td>$578,892</td>
<td>-</td>
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<td>$57,889</td>
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<tr>
<td>Tampa</td>
<td>St. Chad</td>
<td>$65,244</td>
<td>-</td>
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<td>$6,524</td>
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</tr>
<tr>
<td>Tampa</td>
<td>St. Clement</td>
<td>$275,140</td>
<td>-</td>
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<td>$27,514</td>
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<tr>
<td>Tampa</td>
<td>St. Francis</td>
<td>$27,042</td>
<td>-</td>
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<td>$2,704</td>
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<td>Tampa</td>
<td>St. James House of Prayer</td>
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<td>St. Mark</td>
<td>$398,034</td>
<td>6,506</td>
<td>$404,540</td>
<td>$39,803</td>
<td>$40,454.00</td>
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<td>56,795</td>
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<td>Tarpon Springs</td>
<td>All Saints</td>
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<td>Temple Terrace</td>
<td>St. Catherine</td>
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<td>$35,744</td>
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<td>Valrico</td>
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<td>Zephyrhills</td>
<td>St. Elizabeth</td>
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<td>1,549</td>
<td>$110,177</td>
<td>$10,863</td>
<td>$11,017.70</td>
</tr>
</tbody>
</table>

### Totals

- **Funds Received**: $31,377,996
- **Operating Income**: $6,027,454
- **Total Subject to Apportionment**: $37,405,450
- **Operating @10%**: $3,137,800
- **Capital @10%**: $602,745
- **Total**: $3,740,545
Episcopal Diocese of Southwest Florida
Exhibit A - Apportionment Calculation Clarification

The apportionment that each congregation pays to the Diocese of Southwest Florida for the support of the diocese and related activities of the diocese shall be calculated as the sum of two parts: 1) operating apportionment and 2) capital apportionment. The Parochial Report figures used as the basis for these calculations shall be from the report filed two years preceding the year in which the apportionment is due. For example: the 2020 apportionment is calculated using the data filed in the 2018 Parochial Report.

1) Operating Apportionment is calculated as 10% of the congregation’s “Normal Operating Income”, reported on SubTotal A of the Parochial Report. The 10% rate is the default for every year, however the percentage amount may be adjusted as a part of the annual budgeting process. Any exceptions to the rate for a particular year would be approved through the regular approval process of the diocesan budget for that year.

2) Capital Apportionment is calculated as 10% of the congregation’s “Capital Funds, gifts and additions”, reported on Line 8 of the Parochial Report. These apportionment dollars are directed to the capital needs of the diocese and the support of new missions.

The apportionment shall be paid on a regular monthly basis throughout the year unless other arrangements are made with approval of the Diocesan Council in advance.

Please refer to Exhibit B for apportionment calculation definitions as they relate to the Parochial Report.
<table>
<thead>
<tr>
<th>Congregation</th>
<th>City</th>
<th>Diocese</th>
</tr>
</thead>
</table>

### Stewardship and Financial Information of the Reporting Congregation

#### Operating Information for 2018:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Number of confirmed pledges for 2018 report year</td>
<td>(1)</td>
</tr>
<tr>
<td>2.</td>
<td>Total dollar amount pledged for 2018 report year</td>
<td>(2) $</td>
</tr>
</tbody>
</table>

#### Report of Revenues and Expenses for 2018:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Plate offerings, pledge payments &amp; regular support</td>
<td>(3)</td>
</tr>
<tr>
<td>4.</td>
<td>Money from investments used for operations in 2018</td>
<td>(4)</td>
</tr>
<tr>
<td>5.</td>
<td>Other operating income, including unrestricted gifts &amp; restricted gifts used for operations &amp; contributions from congregation’s organizations</td>
<td>(5)</td>
</tr>
<tr>
<td>6.</td>
<td>Unrestricted bequests used for operations</td>
<td>(6)</td>
</tr>
</tbody>
</table>

**Subtotal Normal Operating Income (3+4+5+6) = A**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>Assistance from diocese for operating budget</td>
<td>(7)</td>
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</tbody>
</table>

**Total Operating Revenues (A + 7) = B**

#### Non-Operating Revenues:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Capital funds, gifts &amp; additions</td>
<td>(8)</td>
</tr>
<tr>
<td>9.</td>
<td>Additions to endowment &amp; other investment funds</td>
<td>(9)</td>
</tr>
<tr>
<td>10.</td>
<td>Contributions &amp; grants for congregation-based outreach &amp; mission programs</td>
<td>(10)</td>
</tr>
<tr>
<td>11.</td>
<td>Funds for transmittal to other organizations</td>
<td>(11)</td>
</tr>
</tbody>
</table>

**Subtotal Non-Operating Revenues (8+9+10+11) = C**

**Total All Revenues (B+C) = D**

#### Operating Expenses:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>To diocese for assessment, appointment, or fair share</td>
<td>(12)</td>
</tr>
<tr>
<td>13.</td>
<td>Outreach from operating budget</td>
<td>(13)</td>
</tr>
<tr>
<td>14.</td>
<td>All other operating expenses</td>
<td>(14)</td>
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</table>

**Subtotal Operating Expenses (12+13+14) = E**

#### Non-Operating Expenses:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td>Major improvements &amp; capital expenditures</td>
<td>(15)</td>
</tr>
<tr>
<td>16.</td>
<td>Expenses for congregation’s outreach &amp; mission</td>
<td>(16)</td>
</tr>
<tr>
<td>17.</td>
<td>Funds contributed to Episcopal seminaries</td>
<td>(17)</td>
</tr>
<tr>
<td>18.</td>
<td>Funds sent to other organizations</td>
<td>(18)</td>
</tr>
</tbody>
</table>

**Subtotal Non-Operating Expenses (15+16+17+18) = F**

**Total All Expenses (D+E) = G**

### At Year-End:

#### At December 31, 2018:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>19.</td>
<td>Total cash in all checking &amp; savings accounts</td>
<td>(19)</td>
</tr>
<tr>
<td>20.</td>
<td>Total investments at market value (not including cash reported in line 19)</td>
<td>(20)</td>
</tr>
</tbody>
</table>
### Episcopal Diocese of Southwest Florida

**Parochial Report Analysis**

**2017-2018**

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday Attendance</td>
<td>11,583</td>
<td>11,139</td>
<td>(444)</td>
<td>-4%</td>
</tr>
<tr>
<td>Number of Signed Pledge Cards</td>
<td>7,902</td>
<td>7,950</td>
<td>48</td>
<td>1%</td>
</tr>
<tr>
<td>Total Dollar Amount Pledged</td>
<td>$20,867,937</td>
<td>$21,378,974</td>
<td>$511,037</td>
<td>2%</td>
</tr>
<tr>
<td>Plate, Pledge and Regular Support (Line 3)</td>
<td>$26,143,705</td>
<td>$25,656,468</td>
<td>($487,237)</td>
<td>-2%</td>
</tr>
<tr>
<td>Available for Operations From Investments (Line 4)</td>
<td>$1,286,909</td>
<td>$1,348,815</td>
<td>$61,906</td>
<td>5%</td>
</tr>
<tr>
<td>Other Operating Income, Unrestricted/Restricted Gifts for Operations, Contributions from Congregation's Organizations (Line 5)</td>
<td>$3,370,403</td>
<td>$3,699,144</td>
<td>$328,741</td>
<td>10%</td>
</tr>
<tr>
<td>Unrestricted Bequests used for Operations (Line 6)</td>
<td>$441,693</td>
<td>$673,857</td>
<td>$232,164</td>
<td>53%</td>
</tr>
<tr>
<td>Normal Operating Income (Subtotal A)</td>
<td>$31,242,710</td>
<td>$31,378,284</td>
<td>$135,574</td>
<td>0%</td>
</tr>
<tr>
<td>Assistance From The Diocese (Line 7)</td>
<td>$335,497</td>
<td>$263,354</td>
<td>($72,143)</td>
<td>-22%</td>
</tr>
<tr>
<td>Total Operating Revenues (Subtotal B)</td>
<td>$31,578,207</td>
<td>$31,641,638</td>
<td>$63,431</td>
<td>0%</td>
</tr>
<tr>
<td>Capital Funds (Line 8)</td>
<td>$6,151,592</td>
<td>$6,537,174</td>
<td>$385,582</td>
<td>6%</td>
</tr>
<tr>
<td>Additions To Endowment (Line 9)</td>
<td>$2,294,931</td>
<td>$5,211,938</td>
<td>$2,917,007</td>
<td>127%</td>
</tr>
<tr>
<td>Contributions for Outreach &amp; Mission Programs (Line 10)</td>
<td>$4,395,684</td>
<td>$4,276,917</td>
<td>($118,667)</td>
<td>-3%</td>
</tr>
<tr>
<td>Funds for Transmittal To Other Organizations (Line 11)</td>
<td>$1,234,180</td>
<td>$1,110,599</td>
<td>($233,581)</td>
<td>-10%</td>
</tr>
<tr>
<td>Subtotal Non-Operating Revenues (Subtotal C)</td>
<td>$14,076,287</td>
<td>$17,136,628</td>
<td>$3,060,341</td>
<td>22%</td>
</tr>
<tr>
<td>Total Revenues (Total D)</td>
<td>$45,654,494</td>
<td>$48,778,266</td>
<td>$3,123,772</td>
<td>7%</td>
</tr>
<tr>
<td>Apportionment Paid To Diocese (Line 12)</td>
<td>$3,163,457</td>
<td>$3,398,050</td>
<td>$234,593</td>
<td>7%</td>
</tr>
<tr>
<td>Outreach From Operating Budget (Line 13)</td>
<td>$612,975</td>
<td>$686,097</td>
<td>$73,122</td>
<td>12%</td>
</tr>
<tr>
<td>All Other Operating Expenses (Line 14)</td>
<td>$27,596,209</td>
<td>$27,981,421</td>
<td>$385,212</td>
<td>1%</td>
</tr>
<tr>
<td>Subtotal Operating Expenses (Subtotal E)</td>
<td>$31,372,641</td>
<td>$32,065,568</td>
<td>$692,927</td>
<td>2%</td>
</tr>
<tr>
<td>Capital Improvement Expenditures (Line 15)</td>
<td>$5,505,165</td>
<td>$6,190,835</td>
<td>$685,670</td>
<td>12%</td>
</tr>
<tr>
<td>Expenses for Congregation's Outreach and Mission (Line 16)</td>
<td>$4,455,996</td>
<td>$3,773,864</td>
<td>($682,132)</td>
<td>-15%</td>
</tr>
<tr>
<td>Contribution to Episcopal Seminaries (Line 17)</td>
<td>$49,698</td>
<td>$37,427</td>
<td>($12,271)</td>
<td>-25%</td>
</tr>
<tr>
<td>Funds Sent to Other Organization (Line 18)</td>
<td>$1,422,710</td>
<td>$1,428,793</td>
<td>$6,083</td>
<td>0%</td>
</tr>
<tr>
<td>Subtotal Non-Operating Expenses (Subtotal F)</td>
<td>$11,433,569</td>
<td>$11,430,919</td>
<td>($2,650)</td>
<td>0%</td>
</tr>
<tr>
<td>Total Expenses (Total G)</td>
<td>$42,806,210</td>
<td>$43,496,487</td>
<td>$690,277</td>
<td>2%</td>
</tr>
<tr>
<td>Total Cash in Checking/Savings (Line 19)</td>
<td>$15,426,299</td>
<td>$16,541,941</td>
<td>$1,115,642</td>
<td>7%</td>
</tr>
<tr>
<td>Total Investments at Market Value (Line 20)</td>
<td>$49,523,829</td>
<td>$48,629,569</td>
<td>($894,260)</td>
<td>-2%</td>
</tr>
<tr>
<td>Total Debt</td>
<td>$7,297,000</td>
<td>$7,470,761</td>
<td>$173,761</td>
<td>2%</td>
</tr>
</tbody>
</table>

| Members                             | 28,797 | 28,423 | (374) | -1%     |
Reports to Convention

Bishop’s Cabinet for DaySpring Development

The Cabinet continued with its awareness programs throughout 2018-19 establishing additional relationships in various parts of the diocese. The events were met with not only curiosity but a burgeoning realization that DaySpring is the spiritual center of the diocese.

The Cabinet will continue to focus on awareness but also concentrate new efforts in fund-raising. The need for new and more modern lodging facilities is paramount for DaySprings’ future development.

Among our family of Cabinet members is our prayer team, centered in prayer, providing inspiration, commitment and encouragement in making DaySpring a sacred, safe and blessed home for all people.

We, the Cabinet, are striving to make all that happen.

Michael H. Kline, Chair

Bishop Gray Retirement Foundation, Inc.

The Bishop Gray Retirement Foundation’s financial assistance program continues to provide financial aid to low-income senior Episcopalians from the Southwest, Southeast, and Central Dioceses of Florida seeking help with the costs of retirement living and medical expenses. We do still gratefully receive donations from individuals and parishes from the three dioceses, as well as through estate charitable planned giving. The board of trustees would like to preserve the endowment fund as much as possible, using the income from investments for distributions. During 2019, we have helped 59 Episcopalians, living in retirement communities, assisted living, and senior facilities/apartments in the three dioceses, and about $587,000 has been distributed for financial assistance mostly in the form of monthly housing grants.

Some senior living facilities housing financial aid recipients: Savannah Court of Lake Wales; Savannah Court of Maitland; Westminster Winter Park; Orlando Lutheran Towers; Westminster Towers, Orlando; Trinity Towers South & West, Melbourne; Grand Reserve, Zephyrhills; Lake Point Senior Apts., Tavares; Hampton Manor, Ocala; Atria Senior Living, Spring Hill; Pinellas Heights, Largo; McCown Towers, Sarasota; The Barrington, Largo; Woodlands Village, Bradenton; University Village, Tampa; Heron East, Sarasota; Lesly’s Leisure Living, Tamarac; Palm’s Edge ALF, Riviera Beach; St. Andrews Residence, West Palm Beach; St. James Residence, West Palm Beach.

Board members include: From Southwest Florida The Rt. Rev. Dabney T. Smith, President; Dr. C. Thomas Gooding; Ms. Barbara Kelly, Asst. Treasurer; The Rev. Deacon Bill Moyers; The Rev. Deacon Denise C. Healy. From Southeast Florida The Rt. Rev. Peter Eaton; Canon Richard E. Miller; Dr. Helen Bhagwandien; Dr. Harlington “H” Hanna. From Central Diocese, The Rt. Rev. Gregory O. Brewer, Vice President, Mr. Alexander C. Mackinnon, Secretary/Chancellor; Mr. Guy D. Colado, Treasurer; The Very Rev. Hugh McGlashon, Jr.; Dr. Thomas Bates

Ginger Van Valkenburgh, Exec. Director

Chaplains to Retired Clergy and Families

Our diocese has 13 chaplains to provide pastoral care for approximately 300 clergy and 250 spouses. The chaplains are assigned regionally by deanery and under the direction of the office of the bishop. We provide pastoral care when needed with illness and at the time of a death. Our focus is to connect the retiree with a local congregation, if they are not already attached.

In the spring the bishop sponsors an annual Retired Clergy/Spouse Day at DaySpring. It includes an outside speaker, Holy Eucharist, fellowship, and lunch. Registration averages 120 – 140. This event is coordinated through the diocesan office and is funded through the diocesan budget.

The following is a sampling of some of the ministry being accomplished: hospital visits, luncheons with clergy and spouses; some of us are mailing birthday cards and Christmas
cards, attending funerals and following up as needed; phone calls—particularly to the ill and infirm, home visits—again to the ill and infirm, transportation on occasion, counseling and conversations with clergy widows, transportation provided to church and for events. Much of our work is reactive, responding to situations as they arise.


**Clergy Spouse Association**

The Clergy Spouse Association continues in carrying out its mission and purpose of supporting the spouses of ordained clergy by providing opportunities for enrichment, fellowship, and outreach. Our community strives to connect and engage with spouses of clergy who are active, retired, or widowed. We gathered twice this year for annual events that are designed to build relationships for support and communication.

The 50th Annual Convention’s Friday Holy Eucharist included the announcement of the CSA’s establishment of the Mary Ellen Smith Memorial Endowment. Presiding Bishop Michael Curry offered a special prayer of thanksgiving for the clergy spouses in our diocese and for the growth of the endowment fund for the purpose of outreach needs. Canon Anne Vickers announced that the MES Memorial Endowment and Episcopal Relief and Development were the designated recipients of the special offering collected at the Friday Eucharist. At the Saturday Convention Meeting spouses of new canonically resident clergy were welcomed by Bishop Dabney Smith and were presented with the CSA’s membership pin by Mrs. Susan O’Carroll, President.

The CSA’s 2018 Annual Convention Luncheon featured Barbara Evans as the luncheon speaker. Barbara, spouse of the Rev. Jonathan Evans, provided a presentation on the mission and accomplishments happening at Grace Place of Naples where she was serving as Chief Development Officer. At the luncheon, CSA members were elected to the 2019 Board of Officers. Those elected: Trish Farrell, President; Elise Whitley, Vice-President; Mary Wallis Smith, Treasurer; Terry Hansen-Beno, Secretary; Betty Creeleman, Chaplain; Kathy Hyde, Co-Chaplain; Barbara Brotherton, Sunshine Chair; Sherré Henley, Communications.

The Annual Spring Gathering and Retreat was held at DaySpring over the February 22-24, 2019 weekend and was led by Dr. Rita and Fr. Michael Piovane. The theme for the 2019 retreat was Ten Ways to Love: with some help from Scripture. The weekend began on Friday for CSA members, with Clergy included, for an opening reception and dinner. The weekend of fellowship, worship, and renewal continued on Saturday and Sunday with program sessions led by Dr. Rita and Fr. Michael.

In the area of outreach, the CSA provided a monetary gift at Advent to diocesan students in residential seminaries. The five residential seminarians to receive the 2018 Advent gift were: Brian Cleary; Marcella Robinson; Diana Leavengood; David Wylly; Anne Hartley. In addition, the Sunshine Committee sent greetings, good wishes, and condolences to diocesan spouses of clergy as such occasions arose during the year.

In closing, all spouses of clergy are warmly encouraged to join us for our unique fellowship with one another. Our annual events provide opportunities to create individual relationships and support systems throughout the Diocese of Southwest Florida. Clergy Spouse Association events are publicized through mailers, social media, diocesan publications, and the diocesan website.

*Trish Farrell, President*

**Commission on Ministry**

The Commission on Ministry is an organized group of Lay and Ordained persons appointed by our bishop to serve on this committee with the purpose of acting in an advisory capacity to assist the Bishop with a Nominee’s sense of call, his /her readiness, and other issues, policies and procedures integral to the discernment and formation of all Baptized ministers in the Diocese. These appointees will serve as liaisons in the discernment process for each Nominee. In addition to these duties the commission meets monthly for updates for the aspirants.

During the year 2019, the Commission had as its membership three lay people: Ms. Donna Davis; Mrs. Janice Straske; Mr. Brian Trimble; two deacons: The Rev. Rosalind K. Hall; The Rev. Robert J. Vaught; six presbyters: The Very Rev. Cesar Olivero (Chair); The Rev. Alexander Andujar (Vice Chair); The Very Rev. Stephen B. Morris; The Rev. Margaret L. Sullivan; The Rev. Janet A. Tunnell; The Rev. Stephen F. Zimmerman: Ex Officio: The Very Rev. Carla B. McCook (Standing Committee Liaison) Canon to the Ordinary Richard H. Norman Jr. and his very capable administrative assistant, Tana Sembiante.

The Commission on Ministry recently held a Vocation Information Evening for those discerning if they have a call to serve God in a new way and how they begin the journey forward. In time the aspirants will be invited to participate in the Bishop’s Advisory Panel, one in the fall and one in the spring. During the Panel, a process of interviews will take place for those seeking Postulancy.

*The Very Rev. Cesar Olivero*
Council on Deacons

At last year’s Diocesan Convention, changes were approved to the Canons of the Diocese to remove obsolete language concerning the role and composition of the Council on Deacons in preparation for the development of a role for the Council in support of new directions for the School for Ministry. During 2018, the Council on Deacons fulfilled its responsibility to review applications and make recommendations regarding annual awards under the Episcopal Charities Grant program. The recommendations were developed at the Council meeting in September and approved by Diocesan Council for promulgation at the Diocesan Convention. Fifteen parish-based outreach programs were funded for a total of almost $40,000.

The Ven. Dr. Kathleen Moore, Archdeacon

Cursillo

Cursillo is a movement of the Episcopal Church, under the authority of the Presiding Bishop and diocesan bishops. Cursillo is intended to make saints and apostles. Saints are people who know God, know His love and grace, and live their lives from this relationship. Apostles are saints who have a mission to share that same knowledge with others. Our Presiding Bishop spoke of how the Episcopal Church can help the world live out a life in Christ. He mentioned having a Rule of Life can be an effective way to do this. The goal of Cursillo is to bring the world to Christ by empowering adult Christian leaders using specific methods and tools, which equips and encourages Christians to live out their Baptismal Covenant to serve Christ. Cursillo of Southwest Florida has been working in this Diocese for 40 years to do just that.

There are two English language Weekends and one Spanish language weekend that teach the method. After attending a Cursillo weekend, Cursillistas (participants of the Weekend) are encouraged to meet in small groups on a regular basis for encouragement and accountability. Larger gatherings are held throughout the diocese for sharing and encouragement. There is a “witness talk” that is centered on apostolic action. Cursillo is a lay ministry but we fully rely on spiritual direction from our diocesan priests and deacons, familiar with our rule of life. Are you looking to enhance your walk with Jesus? Are you feeling a call to serve but not sure of the next step? Stop by our table during the Ministry Fair or visit our website cursilloswfla.org. We are all about living a Christ-centered life and would like to help you on your journey.

Chandra Williams, Lay Director

Daughters of the King

Daughters of the King are women and girls between the ages of seven and one hundred and seven who desire a closer walk with the Lord. We are Christian women, both lay and ordained, who are strengthened through the discipline of a Rule of Life and supported through the companionship of our sisters. We are all at different stages of our Christian journey – some have just begun, and some have been on this path for a long time. But no matter where we are on our sacred journeys, our primary goal is the same – to know Jesus Christ and to make Him known to others.

We don’t just enroll as members and attend meetings. After a three-month period of study and discernment, each new member takes vows to uphold the two Rules of The Order, the Rule of Prayer and the Rule of Service and Evangelism. A Rule of Life is a self-imposed spiritual discipline practiced daily by an individual. It includes regular and seasonal devotions, both private and public, and is a commitment intelligently and prayerfully considered. A Rule of Life sets apart an order from other church organizations.

The Daughters of the King hold two Southwest Florida Diocesan Assemblies each year at DaySpring. The Fall Retreat has guest speakers bringing an uplifting renewing message to our Daughters as food and strength for our journey. The Fall Assembly invites speakers to share their ministry, gifts and visions for the walk with God. The Fall Assembly is also a time to take care of the business of the order. The speaker for the Fall Assembly this year is Krisita Jackson, President of the National Order of the Daughters of King.

The Diocese of Southwest Florida has over 30 chapters of the Order of the Daughters of the King. During this year we have three new parishes going through the discernment mentoring process creating new chapters. Daughters who attend parishes that do not have a chapter are able to maintain their Rule of Life and membership as Daughters by becoming Daughters at Large. New chapters may be formed at a parish without an existing chapter at any time. Contact Sue Tharp, 941-928-5428 and bsuet@comcast.net for more information.

Sue Tharp

Diocesan Altar Guild

The Diocesan Altar Guild consists of representatives from the various deaneries. Our job is to support the Bishop and coordinate his wishes throughout the diocese. We meet four times a year at DaySpring and also have an annual meeting in the spring with a program related to our activities. In 2019 we coordinated with the Rev. Canon Katie Churchwell to help launch a brand-new teaching program called “How 2christ”. It was created by the Rev. Callie Swanlund who was present at the full Saturday meeting. This same program is one of the workshops for the current convention.

We also prepare and stage the Convention Eucharist enjoyed by several hundred people. During Convention we also sponsor a huge exchange table of liturgical items. No money exchanges hands and everyone benefits from this exchange. In November, we burn deconsecrated worn
Diocesan Ecumenical and Interreligious Relations

In March, I was asked by the Bishop to follow in the footsteps of the Rev. Ray Bonoan as your Diocesan Ecumenical and Interreligious Officer. I accepted and feel qualified to serve in this capacity as I also did this in the Diocese of Pennsylvania from 2012-17.

At the end of March and the beginning of April, I represented you at the 2019 National Workshop on Christian Unity, this year held in St. Louis. Speakers from many denominations addressed ecumenical concerns, but I focused my time learning what I could about the proposed communion agreement between the Episcopal Church and the United Methodist Church. There was much information shared and this body is optimistic for a future agreement. Our time there was grounded in worship. We opened in worship at the Old Basilica of St. Louis, and heard powerful preaching from the Rev. Traci Blackmon. The rest of our time, our worship was led by Brother Roger from Taizé in that distinct style.

Also in March, I attended “An Evening of Solidarity” at Masjid al Salaam in Dunedin, following the attacks on Muslims in Christchurch, New Zealand. Several other Episcopal clergy were present, as well as many other clergy across denominations and faiths.

Recently, I joined with other St. Petersburg deanery clergy to attend the Lights for Liberty event. It was a national event, held locally at Allendale United Methodist Church and featured prayers and speakers opposed to family separation and child incarceration on our nation’s Southern border.

I look forward to continuing to serve you in this capacity and please don’t hesitate to reach out to me if I can do anything for you.

The Rev. Ryan R. Whitley

Dominican Development Group & Companion Diocese Committee

2019 was another busy year for the Companion Diocese Committee of Southwest Florida. Committee members supported programming and participated in numerous mission trips to the Dominican Republic.

The Tampa Deanery sent 3 teams to complete the construction of the new San Timoteo Episcopal Church in Nizao. They also completed repairs at San Matías School & Morrow Conference Center in Santana and painted at the San Miguel Church in Dona Ana. Participants for this year’s project included missionaries from outside the Tampa Deanery and outside the Diocese, including St. Michael & All Angels in Lake Charles LA. Missionaries worked in partnership with local volunteers, church members, and paid workers and contractors to stain and finish the furnishings, paint, and complete the flooring, electrical and plumbing on the San Timoteo church. 2019 marked the 20th consecutive year that churches from the Tampa Deanery have sent teams to the Dominican Republic. Additionally, the land in the rear of the property has been cleared and planting has begun on the agricultural cooperative. Tampa Deanery plans on returning to the DR with 3 teams in June of 2020 to begin a new project in a new community. The Tampa teams extend an open invitation to anyone interested in participating on their mission teams. Contact Bill Kunkle if you are interested.

The Clearwater Deanery continued the construction of classrooms at the Incarnation Episcopal School in La Romana. The 2-year project has added 6 new classrooms by building a second floor onto the existing school. This year’s team also painted the existing church and school, sealed the roof and completed several other projects. 2019 marked the 19th consecutive year of the Clearwater Deanery Mission teams. These teams have provided valuable program and project support in companionship with the Episcopal Church in the DR. The Clearwater Deanery will begin a new project next year and plans to travel in July 2020.

Additionally, a special thanks to Rev. Daniel Cenci and St. Paul’s Episcopal Church in North Carolina who contributed and sent a mission team in August to work on this important project and sponsor a VBS Program.

Once again, the Cathedral Church of St. Peter sent a mission team to help with the Vacation Bible School program at the churches of La Anunciación and San Lucas, located in Santiago del Los Caballeros, DR. Most of The VBS program booklet was created by the Cathedral team based on stories written for this year’s theme, Jesus’ parables: “There were 5 parables selected including Good Samaritan and the Good Shepherd.” The supplies needed for this program were made possible through generous donations by members of the Cathedral congregation and the Church of the Annunciation, Holmes Beach. 2019 marks the 20th consecutive year (15th in Santiago) that teams from St. Peter’s have traveled to the DR in order to support the VBS program.

The Church of the Redeemer, Sarasota sent a large youth team in June to the San Simon Church in the community of San Marcos and the Cristo Rey Church in Puerto Plata on the North Coast. They helped work on projects at the Eco Park being constructed at the San Simon Church in

Sarah Hill, Directress

DIOCESE OF SOUTHWEST FLORIDA
San Marcos. They also worked in the community on various projects and lead a VBS for the children in the community. The Church of the Redeemer sent an adult mission team to the DR in November to continue the construction of Iglesia Monte Sion (Mount Zion Church) in the Andres community near Boca Chica. The team built the altar furnishings and completed other details and attended the dedication service on November 10th. The Church of the Redeemer has had a long relationship with the Dominican Episcopal Church and hopes to continue this ministry partnership with the Monte Sion Church for years to come and will be sending a team in November to continue this important work.

The ECW for Southwest Florida continues to support critical educational initiatives for the children in the Dominican Episcopal church schools through the scholarship program. They also support the Santo Tomas children’s nutritional and educational programs providing nutritious meals, bible study, tutoring, and computer training to hundreds of children each week. These wonderful ladies also donated school supplies and children’s undergarments to the various communities served through the Episcopal Church.

The Naples Deanery continues to support the Albergue El Buen Samaritano (Good Samaritan Children’s Shelter) in San Francisco de Macoris. Representatives from the Naples Deanery travel frequently to the shelter in support of this important ministry. This program provides vital assistance to the children in this poor community through its quality nutritional and educational programing.

The Dominican Development Group also continued the Mission Pilgrimage Program with 2 teams, one in November and one in April. These groups travel to 23 mission sites across the country promoting relational ministry and learning about the many programs administered through the Episcopal Church in the Dominican Republic. There are still a limited number of spaces available for the Fall Pilgrimage November 14-20, 2019. Contact Bill Kunkle if you are interested in participating on these trips.

The Global Episcopal Mission Network also held its annual missions conference in the Dominican Republic with numerous participants from the Diocese of Southwest Florida and the Companion Diocese Committee. The Diocese of Southwest Florida is a member Diocese in GEMN.

Mr. William Kunkle, Executive Director
The Rev. Kathy Gilpin, Chair, Companion Diocese

Disciplinary Board

For reasons which I hope will soon be evident, I’d like to begin this report with a short excerpt from Ecclesiastes:

To everything there is a season, and a time to every purpose under the heaven: A time to be born, and a time to die; a time to plant, and a time to pluck up that which is planted; A time to kill, and a time to heal; a time to break down, and a time to build up; A time to weep, and a time to laugh; a time to mourn, and a time to dance; A time to cast away stones, and a time to gather stones together; a time to embrace, and a time to refrain from embracing; A time to get, and a time to lose; a time to keep, and a time to cast away; A time to rend, and a time to sew; a time to keep silence, and a time to speak; A time to love, and a time to hate; a time of war, and a time of peace.

On behalf of the nine members of the Disciplinary Board, (The Rev Edward C. Gleason, The Rev. Leo Crawford, The Rev. Jonathan W. Evans, Deacon Jane Y. Kelly, Deacon Chester J. Trow, James D. Park, the Hon. Jack Day, the Hon. E. Douglas Spangler, and myself) I am pleased to report that some matters of ecclesiastical discipline did not change this year: all ecclesiastical discipline Canonical requirements under Canon Title IV have been satisfied. The Disciplinary Board conducted an organizational meeting as required. During this meeting, as subsequently confirmed and approved by both the Standing Committee and the Bishop, John Goldsmith was selected as the Church Attorney. The Board and the entire Title IV process have this year - as in years past - been ably assisted by the Intake Officer for the Diocese, The Rev. Glad R. McCurtain.

In some past years I was able to report that other than conducting an organizational meeting, the Disciplinary Board did not have to come into session to consider any disciplinary proceedings. But like Ecclesiastes reminds us, even in the world of Title IV canon law, things can change. This year they did. We had one matter which was referred to us by the Intake Officer, and which required me to appoint panel members to a conference panel and to select a president for both the conference panel and for a hearing panel. Those panels did not actually have to undertake actual conference or hearing proceedings. Instead, that matter was handled through a restriction on the exercise of ministry which the Bishop issued after consultation with the member of the clergy involved.

There were two other potential Title IV matters this year, but one of those was resolved by the Intake Officer and the Bishop both concluding that the matters alleged would not constitute a Title IV Offense and the Complainant not appealing the Rev. Glad McCurtain’s determination. In the other matter, which is currently in process, the Intake Officer and the Bishop both again concluded that the matters alleged would not constitute a Title IV Offense. As is contemplated by Canon IV.6.5, the Intake Officer has told me that she plans to send the Complainant a notice that they have the right to appeal her decision.

Our prayers are that next year the Board can return to the opportunity only to require an organizational meeting. Three members of the Board (Father Crawford, Father Gleason, Deacon Kelly) and I have terms which expire at this Diocesan Convention. Father Crawford and Father Gleason are allowed to and may choose to run again. I especially appreciate their active involvement with the Board this year. Deacon Kelly and I both are term-limited under the Diocesan Canons. But
I think that in the time she has been on the Board Deacon Kelly has undertaken almost every task other than Board President; thanks so much, Jane.

In closing I want to note a significant personal change coming for me in the world of Title IV Canon Law. As many of you know, I have been involved in the Church’s ecclesiastical discipline process for over twenty years, most of it serving as either the Presiding Judge of our Ecclesiastical Trial Court or as the President of the Disciplinary Board. I have worked with some amazing people in this process, such as our Chancellor, the Church Attorney, and obviously our Bishop. But I can honestly say that never have I had the experience of everyone in the process being so willing to take the time and make the commitment that all of our Board members have this year.

As I noted above, because of term limits I cannot again run for the Board. Carol and I will later this year be moving to Athens, Georgia to be close to one of our daughters and to all three grandchildren. Under Title IV I could not continue to do this for our diocese. But I am thankful for the many wonderful experiences I have had doing this for all of you.

Roger D. Schwenke, President

Education for Ministry

Education for Ministry is a distance-learning program founded by Sewanee, The University of the South, in 1975. EfM began in our diocese in 1987. We are a sponsoring diocese, which means that our participants receive a $100 discount on tuition each year.

EfM is a four-year course of study in the Bible, church history, theological choices and theological application in our lives today. This program is not like any other bible study. An in-depth study of scripture is an integral part of the program, but it is not the only part. EfM is a powerful combination of scripture, worship, theology and theological reflection to help participants develop the skills they need to better discern their call to ministry.

Groups begin meeting in September. On-line group meetings are also available. We currently have groups meeting in Naples, Punta Gorda, Venice, Sarasota, Pinellas Park, and Tampa. The 2020 mentor training will take place at DaySpring on May 14-16.

If you would like information on a group in your area or are interested in mentoring a group, please call or email Martha Goodwill at (941) 556-0315 or mgoodwill@episcopalswfl.org.

The Rev. Martha Goodwill, Diocesan Coordinator

Episcopal Church Women

The Episcopal Church Women of the Diocese of Southwest Florida serves the seventy-seven congregations of the Diocese of Southwest Florida. We are involved in all women’s ministries including the Sarah Howell Grants, Church Periodical Club, Miles of Pennies, United Thank Offering, as well as the Order of the Daughters of the King. The women of the ECW support DaySpring Youth Ministries, Cornerstone Kids, DaySpring Camp & Conference Center, the Dominican Republic Ministries and youth ministries in Haiti.

The Episcopal Church Women’s Annual Meeting is usually held in November each year. In 2018, we were blessed to have Nancy Young and Patti Joy Posan of the Episcopal Community. This interactive workshop shares simple tools of Benedictine spirituality that empower us for that journey—everyday, everywhere.

The 2019 Annual Meeting is scheduled for November 21 and will feature our National President, Karen Patterson and representatives from the Girls Friendly Society. GFS is sponsored by the national ECW and the mission is to provide a support system for girls that is aimed at developing the whole person through a program of worship, service to others, study, and recreation, designed to empower girls and to help them grow mentally, emotionally, physically, and spiritually.

Leila Mizer, President

Episcopal Relief and Development

Episcopal Relief & Development is the compassionate arm of the Episcopal Church. With their help of in-kind support of facilities, we are proud to consistently report that between 90 percent and 92 percent of every donated dollar helps in three major categories: Women, Children, and Climate.

Episcopal Relief & Development contributes to the transformation and healing of a hurting world by encouraging its staff, partners and wider constituency to act as facilitators that engage and energize people through an appreciation and affirmation of the gifts that exist within a community. By recognizing and reinforcing people's assets — their gifts, ideas, decisions and existing resources — versus simply their needs.

There were many transitions this year. First, was the sudden and tragic loss of our beloved Joanne McWhorter “Jody” Tiffany, who served as a Diocesan Coordinator for 19 years. Next, was the retirement of long time Coordinator Maureen Belote, who has faithfully served as the Diocesan Coordinator since 1996. Jody and Maureen were presented the prestigious Canon Joyce Hogg award at the 2019 Conference in Houston.

Ellen Lightner has been appointed as the new Diocesan Coordinator. Ellen is a member of All Saints’ Tarpon Springs. She has spent the past few months working with Maureen to transition into this new role. She will be contacting all parishes and Deanery chairs in the next year to support and establish a presence in as many parishes as possible. It is recommended that all congregations have active Parish Coordinators to keep their congregations informed on news of how we are responding to national and global needs and promote at least one Sunday per year to focus on Episcopal
Religion & Development.

Both Maureen and Ellen attended the 2019 Conference in Houston. During this time, they had the opportunity to tour areas of rural Houston still suffering from the devastation of Hurricane Harvey. It was evident that the contributions of time, talent, and money provided by Episcopal Relief and Development are making a significant impact in that recovery effort.

An exciting new campaign entitled “One Thousand Days of Love” was kicked off in September 2019. The first years of life are critical to a child’s future success. Episcopal Relief & Development’s integrated programs and partnerships with local churches and communities in Africa, Asia, and Latin America bring positive change to children. JOIN US. Get ready to empower more families in more places, enabling children to reach their full potential. Call 614-302-1267 or elightner1@gmail.com

Ellen Lightner, Diocesan Coordinator

Hispanic and Latino Committee

The work of the Hispanic and Latino Committee has been focused on creating opportunities that allow a strengthening of the Latino community in this part of the Episcopal Church. For this, several activities were planned to be carried out in the 2018-2019 period, which we mention below.

For the first time in the diocese the Diocesan Stewardship Workshop was offered in Spanish last August 24, with the participation of the Rev. Dr. Alejandro Montes from the Diocese of Texas, with a good participation of Latinos from our communities.

After the success of the “Salt & Light” conference in 2018, we could see that Latinos are eager to find opportunities to develop their abilities and share them, showing we as Latinos can contribute to the growth of the Episcopal Church. For this reason, the Salt & Light conference has been established as an annual activity where Latinos come together to learn and support each other in our missions. This 2019 the theme was about evangelism and mission, and was to be held in DaySpring in September with the participation of Rev. Dr. Joel Almono Roque as keynote speaker.

Looking forward, this committee wants to promote spiritual growth in our communities. But to achieve this, we have to create a community where we share a vision. It is a slow process that requires unity, patience, perseverance and, above all, the guidance of the Holy Spirit.

We thank God for the support of the Diocesan Bishop and his staff, and we pray that God will continue to give this diocese the wisdom and vision to respond boldly to the needs of so many Latinos who want to find their spiritual home.

The Rev. Hipolito Fernandez De Reina

School for Ministry

In late 2018, the School for Ministry received approval to move forward with an application to join the Iona Collaborative. The Iona Collaborative is a cooperative project now directed by the Seminary of the Southwest in Austin, Texas and currently includes twenty-four Episcopal Dioceses throughout the country. The Collaborative provides high-quality theological education for the formation of priests and deacons in their local diocesan settings, educating a new generation of ordained leaders who for various reasons cannot attend a residential seminary. The Ven. Dr. Kathleen Moore, Archdeacon of the diocese, was named Dean of the School for Ministry and charged with implementation of the Iona curriculum for our diocese. Participation in the Iona Collaborative enables the School for Ministry to be part of an innovative curriculum and to take advantage of resources, facilitator training, and materials that would otherwise be unavailable locally. The new curriculum will be implemented with the entering class of 2020. The School has seven students enrolled; two will complete the program in December 2019.

The Ven. Dr. Kathleen Moore, Dean

Standing Committee Report

The Standing Committee works closely with the Commission on Ministry and has canonical responsibility for approval of applications for Candidacy and Ordination to both the Sacred Order of Priests and the Sacred Order of Deacons. In exercising that responsibility, the Committee is required to interview all candidates for Ordination and those from other branches of the Body of Christ seeking reception to ordained ministry in the Diocese of Southwest Florida.

Since bishops are elected to serve the entire Church, they are canonically required to receive consents to their election by a majority of the diocesan Standing Committees. The Standing Committee acts on these requests for consent as they are received, deliberating on each with care.

The Standing Committee also acts as a cabinet of advice for the bishop, exercises canonical responsibilities related to property matters involving sacred spaces, clergy disciplinary actions, and matters involving clergy leaving the Episcopal Church. Much of the work of the Standing Committee is confidential.

Current members of the Standing Committee are Mr. Michael Alford (Recording Secretary), the Very Rev. Charles E. Connelly (President), the Very Rev. Eric Cooter, Mr. James H. Corn, Ms. Mary Grace Duffy, the Very Rev. Carla McCook (Liaison to the Commission on Ministry), the Rev. Fredrick Robinson (Liaison to Safeguarding), the Rev. Dr. Ellen Sloan, and Mr. Ray U. Stoll. All the members of the Committee appreciate your prayers.

The Very Rev. Charles E. Connelly, President
Youth and Family Ministry

Youth and Family Ministry during 2018-19 has continued to grow and provide diverse opportunities for children and families to experience Christ and Christian community. More congregations have committed to invest in the formation and development of our young people. Activity in diocesan programming has been very strong at our signature programs: New Beginnings, Happening, Acolyte Festival, the Youth Leadership Team and DaySpring Summer Camp. Several churches have commenced search processes for youth ministers as a result of increased family engagement. La Noche de Velitas, an evening of Advent prayer and celebration for families, was offered for the second year at St. Mark’s/St. Francis in Tampa and continues to attract diverse families from the northern part of the diocese. In February, we offered a Christian Formation Day with guest facilitator Dr. Lisa Kimball to further the professional development of our youth leaders and Christian educators. Planning is currently underway to offer Vocare in 2020, a renewal weekend retreat at DaySpring for college-aged students and young adults.

Our diocesan community of youth, youth leaders, and families embodies the desire and dedication of our diocese to serve God and His church and we thank you for your support to further His kingdom.

Greg Randall, Director of Youth Ministry & Programming

Nearby Punta Gorda Hotels

Four Points by Sheraton
33 Tamiami Trail, Punta Gorda
Phone: 941-637-6770
$129.00 Standard Room

Springhill Suites by Marriott
101 Harborside Ave, Punta Gorda
Phone: 941-347-4224
$139.00 Standard Suite

Punta Gorda Waterfront Hotel
300 W. Retta Esplanade, Punta Gorda
Phone: 941-639-1165
$79 City/Park View, $99 Pool View, $129 Waterfront View

Wyvern Hotel
101 E. Retta Esplanade, Punta Gorda
Phone: 941-639-7700
$159 King/Double Queen, $299 Suite

La Quinta Inn & Suites by Wyndham
812 Kings Highway, Port Charlotte
Phone: 941-979-4200
$70 King/Double Queen, $75 Suite

Sleep Inn & Suites
806 Kings Highway, Port Charlotte
Phone: 941-613-6300
$71 King/Double Queen, $81 Suite

Holiday Inn Express
24440 Sandhill Blvd., Port Charlotte
Phone: 941-764-0056
$89 King/Double Queen, $99 Suite

Parking

The convention center has 250 spaces and there is a 400-car public deck two blocks away at Olympia and US 41. There is also nearby parking on the street. There will be people on hand to provide additional directions for parking.

AA Meeting Friday

There are Friday meetings in Punta Gorda and Port Charlotte. Just log onto aanorthport.org for more information including First United Methodist Church in Punta Gorda.
Dining in Punta Gorda

Looking for a place for dinner on Thursday night, convention eve? Or on Friday, after our opening Eucharist? Note that there is no Friday-night dinner party this year; dinner is on your own. Here are some recommendations. Make your reservations now and enjoy a pleasant evening!

The Perfect Caper
Local /organic / natural, seafood, meat, poultry, pasta;
Address: 121 E Marion Ave.,
Punta Gorda 33950
Closes: 9 p.m. Thursday, 10 p.m. Friday
theperfectcaper.com
Reservations: opentable.com
Phone: (941) 505-9009

Laishley Crab House
Seafood, sushi, steaks
150 Laishley Court, Punta Gorda 33950
Closes: 9 p.m. Thursday, 10 p.m. Friday
laishleycrabhouse.com
opentable.com or laishleycrabhouse.com
Phone: (941) 205-5566

F.M. Don’s
Upscale-casual eatery specializing in seafood and other Florida fare. Live music.
Address: 201 W Marion Ave., Punta Gorda 33950
Closes: 9 p.m. Thursday, 10 p.m. Friday
Nmudons.com
Reservations: fmdons.com or yelp.com
Phone: (941) 637-8800

Leroy’s Southern Kitchen
Southern/soul food / steaks/ shrimp / oysters; casual, family-friendly
Address: 201 W Marion Ave., Punta Gorda 33950
Open: from “11 a.m.till late”
Menu: leroyssouthernkitchenandbar.com
Reservations: leroyssouthernkitchenandbar.com
Phone: (941) 505-2489

Carmelo’s Italian Ristorante
Steak, chicken, veal, seafood, pasta.
Address: 321 W Retta Esplanade,
Punta Gorda 33950
Closes: 10 p.m.
Menu: carmelosristorante.com
Reservations: carmelosristorante.com or opentable.com
Phone: (941) 621-4091

The Blue Turtle Tavern and Raw Bar
Coastal tavern: raw bar, seafood, chicken, pork, steak
Address: 139 W Marion Ave., Punta Gorda 33950
Closes: 10 p.m. Thursday, 11 p.m. Friday
Menu: blueturtlepg.com or yelp.com
Reservations: blueturtlepg.com
Phone: (941) 637-9477

Dean’s South of the Border
Tex-Mex favorites, American classics; live music
Address: 130 Tamiami Trail, Punta Gorda 33950
Closes: full menu until 11 p.m., snacks until “late night”
Menu: deanssouthoftheborder.com
Reservations: not accepted
Phone: (941) 575-6100

River City Grill
Chicken, pork, meatloaf, pot roast, fish, vegetarian entrees
Address: 131 W Marion Ave., Punta Gorda 33950
Closes: 9 p.m.
Menu: rivercitygrillpg.com
Reservations: (941) 639-9080
Phone: (941) 639-9080

Italia
Classic Italian: pasta, pizza, veal, steaks, seafood
Address: 127 W Marion Ave., Punta Gorda 33950
Closes: 9 p.m. (bar open later)
Menu: italiapg.com
Reservations: (941) 639-7655
Phone: (941) 639-7655

Sandra’s Restaurant
German and European-style menu
Address: 111 W Olympia Ave., Punta Gorda 33950
Closes: 9 p.m.
Menu: sandras-restaurant.com
Reservations: (941) 575-0177
Phone: (941) 575-0177

Hurricane Charley’s
Seafood, steaks, burgers, pasta
Address: 300 W Retta Esplanade,
Punta Gorda 33950
Closes: 10 p.m. for dinner service
Menu: hurricanecharleys.com
Reservations: not accepted
Phone: (941) 639-9695
RULE I: MAJORITY VOTE REQUIRED

Unless otherwise specified, all decisions shall be by majority of the Members of Convention.

RULE II: DISTRIBUTION OF MATERIALS

(A) No items of any kind, except water and similar generic provisions, shall be placed on the tables on the Convention floor.

(B) Except for materials accepted for inclusion in the registration packets, no papers, including biographical data for persons running for office, shall be distributed on the tables on the Convention floor or to people as they register for Convention.

RULE III: OBJECTIONS TO CONSIDERATION OF A QUESTION

Objection to the consideration of a question can be made only when the question is first introduced before it has been debated. Such objection requires no second, cannot be debated or amended, and must have a two-thirds vote to sustain it.

RULE IV: QUESTIONS OF ORDER

All questions of order shall be decided by the Presiding Officer without debate. If a member wishes to request reconsideration of the decision, it must be requested immediately. The Presiding Officer shall take such consultation as seems advisable and make a final decision, which is not debatable or appealable.

RULE V: RULES OF DEBATE

(A) Members of Convention intending to address the Convention shall use one of the designated microphones and shall preface their remarks with their name and congregation or organization.

(B) Remarks shall be addressed to the Presiding Officer and not to another member.

(C) Debate shall be confined strictly to the subject before the Convention.

(D) Members presenting nonprocedural motions shall have the motion written out prior to making the motion, and shall immediately furnish the written motion to the Secretary of the Convention to ensure that it is accurately stated to the Convention and recorded in the journal of the Convention.

Nonprocedural motions that are not written out prior to presentation shall be ruled out of order.

(E) No Member may speak longer than three minutes at one time, without leave of the Convention.

(F) No Member may speak a second time to a question if any other Member who so desires has not spoken for a first time to that question.

(G) No Member may speak more than twice in the same debate without leave of the Convention.

(H) Total debate on a motion shall be limited to fifteen (15) minutes, except when extended by a two-thirds (2/3) affirmative vote of the Convention.

(I) Total debate on any one Resolution, including all proposed amendments thereto, shall be limited to forty-five (45) minutes, except when extended by a two-thirds (2/3) affirmative vote of the Convention.

RULE VI: CONSIDERATION OF RESOLUTIONS

In order for a Resolution to be presented to and considered by the Convention, it must conform to the provisions of the Canons of the Diocese of Southwest Florida. A proposed resolution that is not presented to the Convention in accordance with the Canons shall be ruled out of order.

RULE VII: MOTION TO SUSPEND THE RULES

A Motion to Suspend the Rules requires a two-thirds (2/3) affirmative vote, is not debatable, and cannot be amended or reconsidered.

Speaking at Convention

- Once the business meeting has begun, if you wish to speak at an appropriate time, please approach one of the two microphones on the convention floor and wait to be recognized by the chair.
  - First state your name and congregation, and then make your comments, which are limited to three minutes. Then return to your seat.
- Convention works through the agenda, with scheduled breaks and a lunch period immediately after nominations close.
Diocesan Staff

Bishop: The Rt. Rev. Dabney T. Smith
dsmith@episcopalswfl.org

Assisting Bishops: The Rt. Rev. Michael Garrison
The Rt. Rev. Barry R. Howe

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Cell: 727-639-2123 / mgoodwill@episcopalswfl.org

Bookkeeper:
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jbuss@episcopalswfl.org

Registrar/Reception:
Ms. Marilyn Erfourth - Ext. 987
merfourth@episcopalswfl.org

Exec. Director, DaySpring Episcopal Center:
Mrs. Carla Odell - 941-776-1018
Cell: 941-524-9444 / execdirector@dayspringfla.org

DaySpring Program Coordinator:
The Rev. Ann Dieterle
Cell: 336-981-4445/ adieterle@episcopalswfl.org

Diocesan Missioner for an Episcopal Gathering in Parrish:
The Rev. Carol Fleming
Cell: 330-749-5934/ cffleming@episcopalswfl.org

The annual Convention Guidebook is published by the Communications Department, Diocese of Southwest Florida. Questions? Contact Editor Garland Pollard at gpollard@episcopalswfl.org or call 941-556-0315.
YOU are the LIGHT of the WORLD

51st ANNUAL CONVENTION

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75 Taylor Street
Punta Gorda, FL 33950
941-833-5444

Diocese of Southwest Florida
DaySpring Episcopal Center
8005 25th St. East
Parrish, FL 34219
941-556-0315
episcopalswfl.org