

## Chancellor's Report to the 2013 Convention

Kathleen Wells, Chancellor

Revision Date: October 16, 2013

### Training:

- Attended and presented at Episcopal Chancellors Network (ECN) Chancellors' Conference triennial meeting (May 2-4, 2013) (speaker on litigation update and vestry control of parish funds; served on planning committee)
- Attended General Theological Seminary seminar on Stewardship of Religious Buildings: The Church as Centerpiece of Community and Congregation (July 11-13, 2013)
- Led four training sessions at diocesan Leadership Workshop (bylaws; meetings best practices; Vestry 101; background check policy) (March 2, 2013)

### Work Outside the Diocese:

- Attended Episcopal Church in South Carolina Special Convention for reorganization, made welcoming remarks on behalf of other four reorganized dioceses (January 25-26, 2013)
- Attended Whirlwind Mission Honor Dance, annual David Pendleton Oakerhater Feast celebration, in Watonga, OK, to honor Owanah Anderson as "honored elder" (September 7-8, 2013)
- Counseled with local complainants in conciliation session in Richmond, VA (January 8-9, 2013), resolution of Title IV complaint filed 2012 by Standing Committee and Bishop Ohl against bishops who filed amicus brief at Texas Supreme Court

### Assistance to Diocesan Entities:

The chancellors assisted the Bishop, staff, and diocesan entities, e.g., attended regular and special meetings; reviewed, drafted documents; negotiated, reviewed contracts, leases; researched and advised on canonical, legal questions; conducted training:

- Standing Committee
- Corporation Board
- Executive Council
- Risk Management Committee
- InReach Committee
- Finance Committee
- Financial Training Committee
- Leadership Team
- Constitution and Canons Committee
- Deanery meetings
- Convention Planning

The chancellors worked extensively in 2013, in coordination with staff and Corporation Board/Risk Management Committee, to finalize, implement the revised background check policy for lay leaders

### **Assistance to Congregations:**

The chancellors continued to work directly with congregations on general legal and canonical matters, e.g., charitable and tax exempt status generally, land acquired for expansion, elections, vestry requirements, draft model bylaws, review bylaws, incorporation of related entities, school issues, leases, title to property.

### **Assistance in Litigation:**

- Counsel of record in Tarrant County/Texas Supreme Court, Hood County (Brants Trust), Wichita County (Burns Trust) litigation
- Assisted, coordinated with outside counsel for the diocesan parties, counsel for Episcopal Church, counsel for congregations in litigation
- Prepared for, attended hearings; coordinated witnesses; prepared, reviewed exhibits, pleadings
- Prepared for implementing court's judgment: Intensive coordination in 2013 with InReach to develop detailed plans for reorganization, reestablishment of Episcopal worship in forty-seven exiled churches, with focus on legal, canonical and title issues and recovery of property
- Monitored ACNA breakaway compliance with supersedeas order, including maintenance of property and expense reporting

### **Pending litigation:**

- No. 141-237105-09; The Episcopal Diocese of Fort Worth et al v. Salazar, et al; 141st District Court, Tarrant County, Texas—motion for rehearing due 10/19/13 on appeal, No. 11-0265 at Texas Supreme Court;
- No. C2009233; Ronald D. Wenner, Trustee of the Cynthia Brants Charitable Reminder Unitrust v. The Episcopal Diocese of Fort Worth, et al; 355th District Court, Hood County, Texas (abated)
- No. 4:10-CV-00700-Y; Episcopal Diocese of Fort Worth v. Iker; U.S. District Court, Northern District of Texas, Fort Worth Division (administratively closed)
- No. 4:10-CV-00783-Y; All Saints Episcopal Church v. Iker; U.S. District Court, Northern District of Texas, Fort Worth Division (administratively closed)
- No. 177,121-C; In Re Lillian M. Burns Trust; 89th District Court, Wichita Falls, Texas (trust terminated, trustee severed out, remaining claims (abated)

### **Goals for 2014:**

- Form effective attorneys group
- Add assistant chancellor(s)
- Assist in diocesan Constitution and Canons Overhaul project

Respectfully submitted,  
Kathleen Wells, Chancellor  
Richard Henderson, Assistant Chancellor

