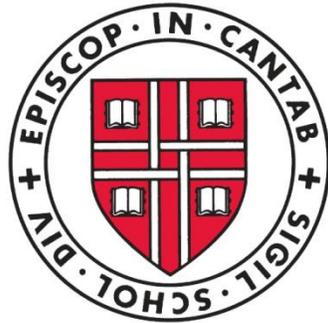


CONFIDENTIAL



**EPISCOPAL DIVINITY SCHOOL
CAMBRIDGE, MASSACHUSETTS**

**Futures Task Force
Report to the Board of Trustees**

June 2016

DO NOT PUBLISH, COPY, AND/OR DISTRIBUTE THIS DOCUMENT

Episcopal Divinity School
99 Brattle Street
Cambridge, MA 02138
866-4EDS NOW
www.eds.edu

TABLE OF CONTENTS

- I. EXECUTIVE SUMMARY 1
- II. FUTURES FRAMEWORK..... 3
- III. COLLECTION, REVIEW, AND SELECTION PROCESS..... 5
- IV. TASK FORCE RECOMMENDATIONS..... 8
- Lesley University Expansion 8
- Abrahamic Faiths Formation..... 11
- Boston University Partnership Development 14
- Episcopal Seminary Consortium 16
- Appendix A: EDS Purpose Statement (1998) and Strategic Vision (2010-2015) 18
- Appendix B: Summary of Proposals Submitted by Type 19

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

I. EXECUTIVE SUMMARY

Dear Board of Trustees:

In **September 2015**, a multi-constituency “futures” task force was formed by the trustees to engage in an iterative dialogue and process including discussions a) within the task force; b) with the community; and c) with the board at its meetings. The goal of the process was to establish a framework for institutional development that defines the optimal character of the institution and a set of principles guiding the institution toward that outcome. To that end, the three main tasks of the task force were to:

- Identify the major issues/challenges that EDS must address in order to thrive in the years ahead;
- Develop a number of plausible future scenarios for EDS that would address those issues; and
- Recommend a compelling future direction for EDS that addresses the major issues by defining its optimal character and guiding principles for achieving that future.

The task force met several times from September through January to discuss major issues and challenges facing EDS and to build the framework for developing plausible scenarios. A forum was held in **February 2016** to present the work accomplished to date and to invite community-wide participation in submitting proposals. Following the February board meeting, the trustees communicated additional guidance and principles to inform the ongoing work and instructed the task force to:

- Encourage creative ideas that substantially strengthen the future of EDS, even if those ideas imply significant change;
- Embrace adaptive, transformational solutions rather than technical ones;
- Avoid pursuing mergers with another small, struggling institution; and
- Be mindful that “time is of the essence”.

In **April 2016** the trustees refined these principles further to help guide the task force’s process of evaluating submitted proposals and advised the committee to focus on proposals that:

- Maintain the historic mission of the school(s);
- Address long-term financial sustainability;
- Don’t involve small-to-small mergers; and
- Don’t represent “business as usual”.

The following document provides a detailed overview of the work performed by the task force from **September 2015 through June 2016**. The report concludes with a summary of recommendations and specific proposals that both, (1) address the major issues facing EDS, and (2) best reflect the guidance and principles outlined by the trustees.

Finally, the task force members, and indeed the EDS community, including the board, alumni/ae, students, faculty, staff, and friends, are eager to work together to realize the kind of adaptive, transformational change that the futures task force has been charged with envisioning. We

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

remain realistic about the challenges that we, and other institutions of theological education, continue to face today, and we are confident that through the exploration, planning, and realization of the task force's recommendations, that EDS will grow and thrive long into the future. As we navigate the delicate balance between urgency and action, we must remain steadfast in our commitment to responding to an ever-changing world in ways that are faithful to our values and our mission.

Faithfully Submitted,

EDS Futures Task Force

The Rev. Susan Ackley '99, Episcopal Diocese of New Hampshire

Cn. Bonnie Anderson, (EDS Honorary Degree '06), Vice Chair of the EDS Board of Trustees

Thomas W. Anderson, Anderson & Tyner, member of the EDS Board of Trustees

Dr. Angela Bauer-Levesque, Vice President of Academic Affairs and Dean, and Harvey H. Guthrie Jr. Professor of Bible, Culture, and Interpretation

Susan Butterworth '17, Master of Divinity candidate, Traditional Learning

The Rev. Dr. Matthew Cadwell '99, Rector of Emmanuel Episcopal Church, Wakefield, Massachusetts

Chris Carr '99, Director of Technology Services at EDS

Elizabeth Coffey '16, Master of Divinity candidate, Distributive Learning (graduated May '16)

Dr. Pamela Conrad '17, Master of Divinity candidate, Distributive Learning

Suzanne Ehly, Artist-in-Residence and faculty in Voice, Body, and Culture

The Very Rev. Francis Fornaro '96, Interim President and Dean

The Rt. Rev. Carol Gallagher, PhD, '89, Bishop for Native American Ministries & assistant bishop of the Episcopal Diocese of Montana

The Very Rev. Gary Hall '76, Chair of the EDS Board of Trustees

Brendan Hughes, Vice President of Enrollment Management

William F. Judge, Vice President of Finance and Operations

Alexizendria Link '08, Province One of The Episcopal Church

The Rev. Sam Rodman, The Episcopal Diocese of Massachusetts

Dennis Stark, Treasurer of the EDS Board of Trustees

Dr. Larry Wills, Ethelbert Talbot Professor of Biblical Studies at EDS

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

II. FUTURES FRAMEWORK

In **November 2015**, the committee reviewed key slides of the Association Governing Boards (AGB) report presented by consultant Dr. Theodore Long at the October trustees meeting. In the AGB presentation, Dr. Long provided an overview of trends in seminary education, an institutional profile of EDS, a summary of ten directions to explore, and a list of possible models for the future.

Dr. Long’s presentation and recommendations were focused on capitalizing on EDS’s physical, human, and brand assets, on reducing costs, on bolstering enrollment, and on developing partnerships within The Episcopal Church, and among other institutions in and around Boston.

Ten Directions to Explore (Dr. Theodore Long, AGB)
How to exploit Boston and Harvard
How to highlight and broaden justice profile
How to capitalize on hybrid learning program
How to develop new pipelines to EDS
How to best combine Episcopal identity and engagement with pluralism
How to renew relationship with wider church
How to increase enrollment and balance profile
How to reduce costs, balance budget w/o harming endowment
How to best utilize asset base for long-term
What leadership role for EDS

The alignment of these challenges and issues set the stage for a preliminary discussion of plausible future scenarios and opportunities that might fit and solve EDS’s near and long-term needs. The committee then discussed AGB’s suggestions for potential institutional models and considered whether Dr. Long’s illustrative examples matched EDS’s current context, situation, and circumstances. The committee concluded that plausible scenarios for EDS’s future needed, at a minimum, to consider:

- Expanding partnerships and collaborations (including the possibilities of mergers/acquisitions)
- Extending institutional reach beyond a predominately Episcopal-focus (ecumenical, seekers, .org)
- Creating new enrollment on-ramps

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

In **December 2015**, the task force welcomed consultant Anthony Ruger to support the committee's work and to assist in working through the financial implications of the various models being developed. The task force made further progress in developing a framework to assist the group in considering a range of ideas and proposals.

In **January 2016**, the task force finalized development of a user-friendly template to assist in assembling narratives and pro-forma budgets. Task force members were instructed to ground proposal concepts within the language and framework of EDS's Purpose Statement developed in 1998 and EDS's Strategic Vision covering 2010-2015 (see Appendix A). A team portal was established to allow task force members to begin developing and sharing proposals and ideas.

In **February 2016**, the task force invited the community to a public forum in the chapel and provided an update on the committee's work to date. Shortly thereafter, EDS's constituent communities were invited to submit their proposals and ideas to the task force by **April 1, 2016** for consideration.

III. COLLECTION, REVIEW, AND SELECTION PROCESS

Collection

The task force created two forms for submissions. A long form was used for proposals that involved partnerships and collaborations that were the result of merger, acquisition, formation, affiliation, consolidation, or expansion concept. A short form was used for ideas that involved analysis, expansion, or investment in the formation of a new model or program. The task force received a total of 47 proposals that were submitted by 30 individuals including 14 by alumni/ae, 11 by faculty, 9 by staff, 8 by students, and 5 by trustees (See Appendix B).

The task force began discussions about the proposals and ideas in mid-April. With less than a month before the May trustee meeting, several task force members asked the trustees to allow additional time, and the trustees obliged. In the interest of expediting the review process, the task force agreed to divide into five teams. Each team then reviewed a set of proposals that involved a like-concept (i.e. consortium, dissolution, partnership, partnership/unification, strategy).

Review

A set of common review questions was developed and merged into a common form that was made available online for proposal evaluators. Proposal team members were asked to complete their individual reviews by Tuesday May 24, 2016 and then convene to discuss their reviews as a group by no later than **Friday June 10, 2016**. The proposal evaluating groups were:

- Consortium: Matthew Cadwell, Brendan Hughes, Susan Butterworth
- Dissolution: Zena Link, Larry Wills, Bonnie Anderson
- Partnership: Susan Ackley, Pan Conrad, Bill Judge
- Partnership/Unification: Chris Carr, Sam Rodman, Angela Bauer-Levesque
- Strategy: Carol Gallagher, Suzanne Ehly

Evaluators were reminded to review proposals through the lenses of the principles outlined by the trustees and charged to:

- Recommend proposals that are most closely aligned with trustee criteria (see Executive Summary, page 1);
- Reject proposals that didn't substantially meet trustee criteria and/or were insufficient to review completely; and
- Retain a "parking lot" of proposals/ideas that could complement recommended proposals.

Selection

The proposals included a wide array of concepts, configurations, topics, and strategies. Together, the 47 submissions represent the tremendous creativity, know-how, and commitment of the EDS community. While the task force found several interesting ideas among the 47 submissions, four proposals emerged as having the potential to fulfill all the process criteria and to transform and strengthen EDS's mission financial sustainability, and that represent a truly innovative path forward.

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

The task force recommends the trustees adopt the following proposals and, because time is of the essence, explore and develop the proposals in a phased implementation. Some of the selected proposals represent similar ideas that were merged. The proposals selected by the futures task force are:

1. Expanding EDS's Relationship with Lesley University with the goal of realizing further operational efficiencies in physical plant, technology, and other administrative services, and expanded revenue opportunities through new joint academic programs.
2. Establish a center for Abrahamic Faiths Formation at EDS with the goal of engaging partners in the Jewish and Islamic traditions on EDS's campus, offering new degree, certificate, and/or adult learning programs around Abrahamic faith formation, religious conflict mediation, leadership, and/or policy. This proposal would realize operational cost savings through sharing campus facilities and administrative services, as well as potential expanded revenue from a broadened fundraising base and new programs.
3. Develop a partnership with Boston University modeled broadly on the partnership of Berkeley Divinity School with Yale Divinity School. In this scenario, EDS would become an Episcopal House of Study for Boston University's School of Theology. The two partners share a dedication to ministry preparation, and to justice-oriented, anti-oppression curricula. EDS would continue to offer theological education and formation grounded in the Anglican tradition, and Boston University would benefit from EDS's human and physical resources, including faculty to teach Anglican courses, and potential classroom, office, worship, or housing space.
4. Create a national consortium of several Episcopal seminaries that would result in substantial consolidation of the Episcopal seminary market, add revenue in the form of an influx of new students, cost savings in the form of shared administrative systems and/or personnel, with the possibility of establishing deeper partnerships over time, possibly resulting in institutional consolidation.

The four proposals that the Futures Task Force has recommended to the Board together have the potential to meet the criteria that the task force was asked to use in its evaluations. All of them have the potential to realize cost savings, and new revenues. All of them have the potential to strongly partner EDS with one or more large institutions. All of them allow EDS to fulfill and expand its purpose within the churches and the world while maintaining its institutional integrity.

The task force also selected the above proposals because none of them are mutually exclusive to another, and because they in fact have the potential to be implemented in series or combination—some parts of the four may be implemented expeditiously in fulfillment of the “time is of the essence” criteria, while others may be phased in over time and see cost savings or revenue enhancement realized over many years.

Phased Implementation

Proposal evaluators considered the evolutionary stages of a developing a successful strategic partnership. Evaluators agreed that the development of any next-generation partnership with EDS will require a combination of deep institutional trust, honest evaluation of institutional

Futures Task Force: Report to the Board of Trustees – June 2016

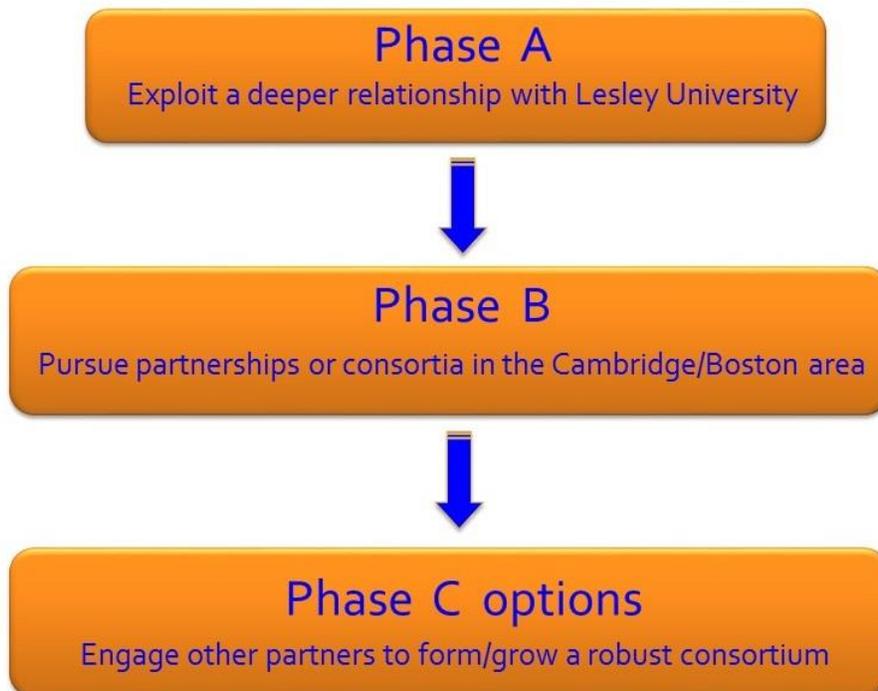
(CONFIDENTIAL – Do not publish, copy, and/or distribute)

strengths and weaknesses, independent research and due diligence, clear objectives, and constant communication between partners. As four recommended proposals emerged, readers also discussed logistical and compatibility factors such as complexity, timing, sequencing, synergy, and location.

Out of those evaluations and subsequent discussions came the task force's strong recommendation that the four proposals outlined here be explored and implemented in phases, beginning with the expanded Lesley University partnership, continuing with the Abrahamic Faiths and the Boston University partnerships, and eventually growing a robust consortium of Episcopal seminaries.

The reasons for pursuing phased implementation are several. In the case of the Lesley University partnership, there is an existing relationship and a desire to deepen that relationship both operationally and programmatically, thus making it the most expedient proposal in terms of completing due diligence and entering into any new agreements. In the case of the Abrahamic Faiths and Boston University partnership, there are several variables with different time horizons, including the potential move of Hebrew College from the Andover Newton campus, and the establishment of an Islamic school of theology in the Boston area, that could expedite certain aspects of those proposals. In the case of the Episcopal consortium, because it involves multiple partners and a potentially complex agreement, it makes sense to explore and implement that proposal last, after EDS has been strengthened by one or more of the other three proposals.

Phased Implementation



IV. TASK FORCE RECOMMENDATIONS

Summary

The following sections will provide an overview and summary of the proposals being recommended to the trustees by the task force. As mentioned in the previous section, the task force agreed to merge two proposals that involved deepening and expanding the existing partnership with Lesley University. The Abrahamic Faiths Formation proposal received enthusiastic support from the task force for its creativity, multiple partnership possibilities, and transformative potential. The task force also agreed to merge three proposals that involved developing a deeper partnership with Boston University (i.e. beyond BTI). The Episcopal Seminary Consortium proposal concept, while being the least fleshed out of the four proposals in terms of identifying a specific organizational structure and governance model, also showed potential for its alignment to EDS's historic mission, strength of partners, and leveraging of relationships and technology.

Lesley University Expansion

The first Lesley University proposal focused on the reconfiguration and leveraging of the collective real estate and technology on the Brattle campus. The second Lesley University proposal focused exclusively on expanding and strengthening an academic partnership with Lesley through collaborative design of curricula ranging from certificates to dual-degree to new degree programs. This consolidated Lesley University partnership proposal offers the potential of increased cost savings through further reduction in facilities expenses, new revenues through the addition of new joint academic programs, and the potential to augment our endowment through the sale of underutilized real estate to Lesley.

Overview of Current Partnership and Relationship

The current partnership and condominium relationship is healthy and has brought considerable mutual and tangible benefits to each organization. In addition to improving unrestricted endowment assets through real estate sales, EDS realized substantial operational saving through both the transfer and reduction of facility-related expenses. At the same time, EDS was able to revitalize its retained plant assets through a combination of renovations, upgrades, improvements, and investments in long-standing deferred maintenance. Each partner has a continuing and significant vested interest in maintaining the condition, value, and maximum utilization of their respective core and joint assets (e.g. Sherrill Library, common grounds). Each organization has established technology-based online program platforms. Each organization has established graduate-level programs located on the Brattle campus. Each organization has expressed a continuing interest in exploring joint program opportunities. Additional foundational benefits of the partnership include:

- Established Legal Structure – The partners have a master deed and related agreements in place that form a flexible commercial condominium and operating structure.
- Improvements – The partners have made significant investments in the physical plant (2009-2016) and have a comprehensive understanding of the nature and extent of remaining deferred maintenance issues.

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

- Reduction of Facilities Expense – The partners have a mutual interest in maximizing the utilization of facilities to generate revenue and containing the related operating and maintenance expenses.
- Operating Budgets (security, snow plowing, custodial, etc.) – The partners have budgetary experience and an established collaborative operating model for campus operations and maintenance as well as library/classroom/office operations and maintenance.
- Technology – The partners have made significant and similar investments in their respective network, classroom, and administrative technologies.

Reconfiguration of Real Estate

As mentioned above, the Master Deed for the 99 Brattle Street Condominium was established in 2008 as a commercial condominium under the provision of Chapter 183A, Section 21 of the Massachusetts General Laws. The condominium agreement has a board and by-laws and the related terms are largely based on the individual unit interests (individual properties) of each partner. The percentage unit interests of each partner is also used to determine allocation of common costs. EDS's properties that are not currently part of the condominium agreement (i.e. non-condo) are the residences on St. John's Road and the Deanery. A renegotiation might include a reconfiguration of the properties that are already in the condo (e.g. Reed could be renegotiated to be a 50/50 ownership arrangement similar to Sherrill Library) as well as embarking on new discussions to consider reconfiguring any combination of properties that are currently considered non-condo.

One illustrative example could involve EDS getting out of the housing business (i.e. properties on St. John's Road). In this example, EDS would investigate Lesley's interest in owning some or all of EDS's residential units on St. John's Road. EDS has already negotiated a right to reserve 15 housing units from Lesley in its current partnership agreement. If needed/desired, EDS could renegotiate rights to reserve additional housing units for its future student needs. A natural extension of how this housing example might evolve would be through discussions about joint graduate-level programming that leads to a co-examination of our similar housing needs (e.g. housing to support families, two week intensive programs, executive programs, etc.).

New/Joint Academic Programs

When EDS first entered into a partnership with Lesley University (final closing in July 2009), there was the hope for an academic partnership as well. Both partners explored potential synergies between existing programs with limited results. Variances in accrediting standards (ATS vs. NEASC) contributed to issues of both program length and cost. Despite eighteen months of regular meetings between Lesley's Graduate School of Arts and Social Sciences (GSASS) and EDS's faculty and administrators, only small gains were made. Though these initial efforts resulted in minimal cross-registration, EDS's student did nonetheless gain the ability to earn a concurrent Certificate in Psychological Counseling for Clergy and Health Professionals.

Exploration of net-new programs and programming through common NEASC accrediting standards would remove current obstacles, broaden the set of possible mutual institutional interests, and set the stage for inclusion of additional partners and funding sources (e.g. Lincoln Institute, other BTI schools, foundations, etc.). Recent discussions with Lesley of potential program partnerships ranged from certificates to dual-degree to new degree programs designed

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

together. There is a solid basis from which to build on. Shared institutional values include: commitment to social justice and peace making; graduate education; conflict reduction and/or resolution; and access to new audiences for executive education. Areas of future collaboration may include education (educational technologies; cross-cultural learning), social sciences (psychology; expressive therapies), intercultural studies, community arts, health sciences (public health; neuro-science), and social work (LU is planning on a social work degree in the near future).

Leveraging Technology

As mentioned above, both partners have made significant and similar investments in their respective network, classroom, and administrative technologies. Both institutions have established technology-based programs, both co-own Sherrill Hall, and both currently use similar network and classroom technology with some duplication of resources. There is considerable opportunity to leverage new technology investments to support on-line platforms. Increased collaborative planning and investments in life-cycle and next-generation technology could result in improved scale, utilization, and possible savings for both organizations.

Revenue Enhancement and Expense Reduction

EDS's primary objective in the next phase of the Lesley partnership would be to lower its operating expenses related to real estate while increasing revenue opportunities through new/joint programming with Lesley. To this end, EDS will need to evaluate the relative benefits of owning/controlling its current collection of real estate units versus the potential sale of units and/or the negotiated long-term use of units. A November 2013 appraisal of properties on St. John's Road (including units 8, 9, 10, 11, 13, 15) stated a combined market value of \$7.925M. An estimated market value of the Deanery (4 Berkley St.) is between \$4.5 and \$5.0M. The strategic goals of reconfiguring real estate and new programming would be to:

- Reduce current annual endowment draw by .75% to 1.00% (Note: The net dollar effect of lowering EDS's draw dependency to this degree would be in the range of \$450K to \$650K per year)
- Lower operating expenses related to real estate while increasing revenue opportunities through new/joint programming with Lesley
- Enhance fund raising and advancement opportunities (Note: Reducing annual draw needs will not entirely eliminate EDS's need to significantly increase its efforts toward building a robust annual and comprehensive giving platform)

Abrahamic Faiths Formation

Overview

In today's religious landscape, conflict rather than collaboration between faith communities reign. Progressive Christian seminaries and theological schools have made inroads in teaching "other" faith traditions (e.g. a recent Luce funded initiative to teach Islam and hire Muslim faculty; and previous efforts at Jewish-Christian dialogue for seminarians). While some seminaries (e.g., Hartford Seminary; Andover Newton Theological School; Union Theological Seminary in NY) and divinity schools (e.g., Harvard Divinity School; Divinity School at the University of Chicago; Claremont School of Theology) have succeeded in recruiting students and hiring faculty from multiple faith traditions, most have taught about faith traditions and "theologies" rather than practiced them together in community, i.e. provided formational experiences "where the rubber hits the road."

Concept

With the departure of Andover Newton Theological School (ANTS), the Rabbinical School of Hebrew College is a potential partner for ministerial formation. A move to Brattle Street would allow for daily intermingling, as well as continuing some collaborative programming that existed with ANTS and Hebrew College (see the Center for Inter-Religious and Communal Leadership Education, co-led by Celine Ibrahim-Lizzio, who taught introductory courses to Islam during EDS's Luce grant period).

Illustrative Example

- Hebrew College moves to Cambridge (bringing some \$\$ from sale of real estate) and rents space from EDS (e.g. Reed Hall) for office and study space (revenue stream)
- Hebrew College joins the Condo Association and shares classroom space (reduced condo association costs)
- Hebrew College brings endowed Circle program of Jewish-Muslim engagement (EDS programmatic enrichment; fund raising opportunities)
- Hebrew College interested in Jewish-Christian engagement as well (HC community connections energize EDS social justice work "out there," leading to marketing opportunities, increased enrollment, fund raising opportunities)
- Hebrew College and EDS share resources and promote/grow technology driven pedagogies (savings; revenue from additional audiences)
- Hebrew College and EDS share functions in administrative areas (savings)
- Hebrew College and EDS collaborate on academic offerings, co-taught courses, etc. (EDS's DMin degree may attract rabbis and other Jewish educators).
- Hebrew College is interested in "multi-faith literacy" and "social justice centered spiritual practice." (synergy could be attractive on various levels)
- Lesley and other undergraduates may be interested in an intentional multi-faith "house"/dorm led by Circle leadership, including EDS eventually (revenue)

Other Potential Partners

EDS can also build on the collaboration of the Diocese of Massachusetts with the Muslim community that holds their Ju'mah Friday prayers at the Cathedral and whose needs were incorporated in the recent renovation. In addition, EDS can contact the Islamic Centers in

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

Cambridge and in Roxbury, a training place for Muslim leaders, to explore residency on the Brattle campus. While the three schools would remain independent, they would commit to interdependent ministerial formation, growing graduates (rabbis, imams, priests, ministers), who are multilingual in faiths, while grounded in their own identities.

Harvard University's Kennedy School of Government (KSG)

EDS can build a relationship with Harvard's Kennedy School that would seek to broaden interfaith dialogue through a combination of certificates and/or degree specialization, executive education, research, and events. Several potential intersections of collaborative interest include:

- Marshall Ganz's "Public Narrative" project gets at the root of the fact that among other human interactions, faith traditions are expressed in stories/narratives.
- The Community Organizing aspects of the "Leading Change Network" fit with EDS's Contextual Education Program, as well as practical engagement of various community programs led by Hebrew College, and can be imagined to be appealing to a progressive Muslim partner.
- Shared values in working toward justice in the public realm.

Transformational Opportunity

Living in a more and more interconnected world, in terms of religion a major tendency has been to retract (isolationism; tribalism; glorification of purity; etc.) rather than to reach out, learn, and grow into embracing and celebrating differences and faith values together with distinction. (Audre Lorde's now famous line "we do not have to become the same in order to work together," comes to mind.) The immersive experiences of daily living and learning and practicing religions together would provide an education unmatched in the Northeast, if not the entire Eastern half of the country. The opportunities at Claremont School of Theology in Southern California perhaps come closest although without an Episcopal component aside from Diocese of Los Angeles's Bloy House.

Potential Benefits

Implementation of this concept would necessitate reevaluating the current use of existing buildings. Nonetheless, Lesley University has expressed interest in participating in the exploration of this concept as it has the potential to lead to increased enrollments and academic partnership possibilities. Further, a parallel lifelong learning offering might be attractive to any clergy working in hospitals, prisons, or the military, as well as on college campuses. Other potential benefits include:

- Rental revenue from buildings
- Expense reductions/savings through the shared services opportunities between three theological schools
- Attraction of donors to the vision of interfaith justice and peace-making, especially those who value actual practice and formation and find this reorientation worthy of their philanthropic commitments
- Expansion of the current offerings of a progressive Episcopal seminary, equipping graduates with "added value" to their formation and education through:
 - Use of Chapel as Center for Liturgical Learning/Exploring Practices

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

- Expressions (i.e. learning from building multi faiths space(s) together)
- New Lesley Program partnerships, ranging from certificates to dual-degree to new degree programs designed together
- Additional certificates and/or degree specialization within the EDS curriculum

Boston University Partnership Development

The task force agreed to merge three proposals that involved developing a partnership with the Boston University School of Theology. The central objectives within each of these proposals contained enough similarities to consider the proposals as a unified concept rather than separate scenarios.

Overview

There is a strong sense in each of the three proposals that the Boston University School of Theology (BUSTh) is the most compatible of the Boston/Cambridge area theological schools for EDS to develop a formal partnership with. Each of the proposals cite EDS and BUSTh's shared commitment to inclusive and justice-focused theological education and highlight the potential affinity between the Episcopal and Methodist church traditions. There is not, however, a strong consensus within the proposals on the model or shape the partnership might take.

Concept

The general concept is to explore a partnership between EDS and BUSTh along the lines of the Berkeley Divinity School at Yale. BUSTh has students preparing for ordination in The Episcopal Church (TEC), but, does not provide specific courses in Anglican Church history and polity that are required for ordination in TEC. EDS would offer faculty in Anglican/Episcopal history, theology, liturgics, and pastoral care (influenced by its long-standing commitments to justice, feminist liberation theology, anti-racism, and multiculturalism). BUSTh would offer EDS the larger institutional infrastructure, faculty, etc. The partners would investigate organizational models to determine an appropriate governance and operating model for the partnership. The extent to which EDS continues to maintain its autonomy, retain its own campus, grants degrees, etc. would be among a long list of negotiating details.

Transformational Opportunity

The idea of an Episcopal-Methodist collaboration in theological education is compelling. TEC's growing relationship with the Methodist Church makes this an ideal time to extend the depth of this effort in New England. EDS's students would gain access to the academic and extracurricular resources of a larger school of theology--including the potential richness of taking courses with M.A. and Ph.D. students without foregoing a ministry-focused environment that is so essential in formation for ordination. BU students would benefit from exposure to the mission, theology and social witness of the Anglican Communion.

Potential Benefits

As mentioned above, the curriculum at BUSTh is the most compatible of all local theological schools offering the kind of formation dioceses expect for postulants and candidates. BUSTh could provide a wide variety of financial, academic, professional, and community resources that are typically beyond the means of an independent denominational seminary. The potential joint-expansion of on-line course offerings will also bring greater diversity of subject matter and faculty to the EDS community. EDS would continue to offer justice-focused theological education in the Anglican tradition.

If practical, the core of the EDS campus would be maintained with the continued offering of chapel services and student housing. EDS would continue to maintain strong ties with its

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

alumni/ae base. Advancement and fundraising, from the EDS perspective at least, would be enhanced by demonstrating that the partnership provides excellent theological education and formation for ministry in TEC in partnership with a major university dedicated to social justice.

Potential Issues

If EDS is seriously considering a long-term collaboration with a local school of theology, it is very important to choose a partner whose approach to theological education is consonant with that of EDS and favorably seen by TEC and the local dioceses. Otherwise there is no point in entering any collaboration with another school of theology. It is essential for BUSTh to want to maintain an explicitly Anglican studies program, *and* be committed to forming students for ministry in TEC. In addition, any partnership model with BUSTh that involves EDS remaining on the Brattle Street campus, in part or whole, must identify and include significant cost reduction strategies in order to be sustainable.

Episcopal Seminary Consortium

Overview

Regardless of geographical location, Episcopal seminaries share the common challenge of adapting and transforming their core assets (physical, human, intellectual) into programs and services that meet the needs of the church and world in the 21st century. The envisioning of collaboration among Episcopal seminaries is per se not a new idea. The concept of enhancing cooperation and coordination among seminaries of The Episcopal Church has gained momentum as seminaries are faced with flat or declining enrollments and denominational decline. In fact, several meetings of TEC Deans, including one in recent years with then Presiding Bishop, The Most Rev. Dr. Katharine Jefferts Schori, have discussed similar concepts in theory. Implementation, however, has yet to be attempted.

Several proposals described solving this common challenge with individual partners. While partnering with other seminaries on an individual or one-to-one basis would constitute a “small to small” idea, and thus not meet the criteria set forth by the board of trustees, a partnership with several other Episcopal seminaries would constitute a large or significant partnership—both in terms of the potential cost savings and new revenues for the institutions themselves, and in terms of impact on theological education for the Church and the world. With this in mind, the task force merged several small proposals to form the broader concept of developing a consortium.

It is worth noting again that this proposal requires the most due diligence, planning, and negotiation of the four scenarios the futures task force has recommended. Because of this, the task force envisions this proposal as the final phase in the implementation process, and one that would be optimally realized only after two or more of the other recommended proposals are already implemented. That reality in no way makes the Episcopal Seminary Consortium proposal less promising—it is merely to acknowledge the complexity of the arrangement.

Concept

EDS will initiate discussions with the middle to left-leaning Episcopal seminaries including Bexley Hall Seabury Western Theological Seminary Federation (Chicago, IL), Church Divinity School of the Pacific (Berkeley, CA), and Seminary of the Southwest (Austin, TX) with the concept of a consortium (i.e. alliance, federation, cooperative, etc.) rather than a merger or consolidation of institutions. Generally speaking, mergers often give the perception that there are winners and losers. A consortium approach, while perhaps more complex in structure, will open up space for creativity and exploration among the partners.

Transformational Opportunity

Each of these seminaries is facing the common challenges related to sustaining the residential M.Div. model. Each are encountering an increasing number of individuals coming to the ministry as a second career—who face practical difficulties and substantial expense when it comes to relocating. To face this challenge, seminaries are embracing new models of distance education and providing new, more flexible alternatives to the traditional residential seminary model. Still, there is a need to develop new and fresh models of training people for ordained and lay leadership and diversify beyond collective Episcopal-centric offerings. A technology-forward consortium approach will provide a forum for identifying and assembling core competencies,

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

allow the strengths of each seminary to emerge, spur the development of new and innovative models, create a flexible platform to “try on” and test new curricula, and set the stage for deeper collaboration on shared administrative functions. Further, this approach could also both learn from non-geographic consortia in other fields and provide leadership in the area of theological education within the Association of Theological Schools (ATS).

Potential Benefits

- Sharing faculty and administrative functions
- Allow for economies of scale on all technology-based platforms
- Offer students broader cross-registration into distributed learning courses
- Offer students richness and breadth of TEC and Anglican tradition
- Students would be required to work with very different styles of teaching and liturgical practices
- Collaborative shaping of Episcopal theological education beyond diocesan training for ministry

Potential Issues

- Identifying and agreeing on governance and operating model
- Disparity of existing technology-based platforms
- Finding agreement on curriculum design for a common MDiv degree

Appendix A: EDS Purpose Statement (1998) and Strategic Vision (2010-2015)

EDS Purpose Statement (1998)

The purpose of Episcopal Divinity School is to educate lay and ordained leaders for Christ's Church and for the world who serve and advance God's mission of justice, compassion, and reconciliation. A seminary for the Episcopal Church, Episcopal Divinity School is grounded in the Anglican tradition and committed to growing in relationship with other Christian and faith traditions. Episcopal Divinity School is an academic community of biblical, historical, and theological inquiry that respects students as responsible learners with valuable experience, supports spiritual and ministerial formation, and provides tools for the life-long work of social and personal transformation.

The School's dedication to God's transforming mission challenges us to become an antiracist and multicultural community, embodying diversity and seeking constructive change. These commitments lead to educational programs enlivened by theologies of liberation, especially the many voices of feminist, congregational, ecumenical, and global studies. In our educational life we value critical intellectual engagement, prophetic spirituality, and social action. Sustained by contemplation, worship, and prayer, Episcopal Divinity School forms leaders of hope, courage, and vision to witness to the gospel of Jesus Christ.

EDS Strategic Vision (2010-2015)

Ministry Preparation: EDS must prepare students for diverse ministries and careers, lay and ordained, across denomination and faith communities.

Flexibility and Sustainability: EDS must provide for the long-term financial sustainability of the School.

Issues: EDS must expand and enhance its teaching on issues of classism, ableism, inter-religious tolerance, and the environment.

Partnerships: EDS must build a progressive Christian movement, both domestically and abroad.

Technology: EDS must invest in the necessary administrative systems, online services, and infrastructure for distributive Learning, webcasting, and new pedagogies arising from educational technologies.

Futures Task Force: Report to the Board of Trustees – June 2016

(CONFIDENTIAL – Do not publish, copy, and/or distribute)

Appendix B: Summary of Proposals Submitted by Type

	Type	Action	Result	Description	Submitted By	Current
1	Consortium	Formation	Center/Institute	Center for Lifelong Ecclesial and Ministry Formation	Alphen	Student
2	Consortium	Formation	Center/Institute	Global Center for Living Liturgy	Oak	Staff
3	Consortium	Formation	Center/Institute	Global Center Liturgy Multicultural Theology	Sakakibara	Student
4	Consortium	Formation	Center/Institute	Institute, Eradication of Racism	Conrad	Student
5	Consortium	Formation	Center/Institute	Institute, School for Social Justice (Jimmy Carter)	Conrad	Student
6	Consortium	Formation	Center/Institute	Abrahamic Faiths Formation	Bauer-Levesque	Faculty
7	Consortium	Formation	Center/Institute	EDS Center of Excellence with MIT	Conrad	Student
8	Consortium	Formation	Center/Institute	Environmental Justice with Lincoln Institute	Nilsson	Trustee
9	Consortium	Formation	Center/Institute	Global Seminary (partners not identified)	Holicky	Student
10	Dissolution	Consolidation	Acquisition by	Philadelphia Lutheran Seminary/Gettysburg Lutheran Seminary	Cadwell	Alum
11	Dissolution	Merger	Acquisition by	Trinity College (Toronto)	Cadwell	Alum
12	Dissolution	Merger	Acquisition by	Harvard Divinity School	Anderson, T.	Trustee
13	Dissolution	Merger	Acquisition by	Luce Foundation	Stark	Trustee
14	Dissolution	Merger	Acquisition by	Wesley Methodist Seminary (Washington DC)	Ackley	Alum
15	Partnership	Affiliation	New Programs	Trinity College (Hartford CT) MATS program	Eoyang	Staff
16	Partnership	Affiliation	Undetermined	Western Canada	Wills	Faculty
17	Partnership	Affiliation	Undetermined	Harvard Divinity School (incomplete form)	Patterson	Alum
18	Partnership	Consolidation	New BTI	BTI Home	Walton	Alum
19	Partnership	Consolidation	New BTI	BTI Resources	Montague	Alum
20	Partnership	Expansion/Development	New Model/Programs	Lesley University Academic Partnership	Bauer-Levesque	Faculty
21	Partnership	Expansion/Development	New Model/Programs	Lesley University Partnership	Judge	Staff
22	Partnership	Formation	Center/Institute	EDS Institute with Reconstructionist Rabbinical College (PA)	Conrad	Student
23	Partnership	Merger	Federation with	Bexley Seabury Federation (new)	Wills	Faculty
24	Partnership	Merger	Federation with	Hartford Seminary (CT)	Wills	Faculty
25	Partnership/Unification	Merger	Acquisition of	Bexley Seabury (old)	Wills	Faculty
26	Partnership/Unification	Merger	Acquisition of	CDSP	Wills	Faculty
27	Partnership/Unification	Merger	Acquisition of	Colgate Rochester Divinity School	Wills	Faculty
28	Partnership/Unification	Merger	Acquisition of	Lancaster Seminary	Wills	Faculty
29	Partnership/Unification	Merger	Acquisition of	Trinity Lutheran Seminary (Columbus)	Cadwell	Alum
30	Partnership/Unification	Merger	Acquisition of	Trinity Lutheran Seminary 2 (Columbus)	Ackley	Alum
31	Partnership/Unification	Merger	Acquisition of	Bangor Seminary (ME)	Wills	Faculty
32	Partnership/Unification	Merger	House of Study	Boston University School Theology	Dolnikowski	Alum
33	Partnership/Unification	Merger	House of Study	Boston University School Theology 2	Ferner	Alum
34	Partnership/Unification	Merger	House of Study	Boston University Theology Anglican Studies	Cadwell	Alum
35	Partnership/Unification	Merger	House of Study	BTI Anglican House Studies (with Harvard/BU)	Cadwell	Alum
36	Partnership/Unification	Merger	House of Study	Claremont (incomplete form)	Paterson	Staff
37	Strategy	Analysis	Reports	Asset Audit	Anderson, A.	Staff
38	Strategy	Expansion/Investment	DL Program	Additional DL Sessions	Cull	Staff
39	Strategy	Expansion/Investment	New Model/Programs	MOOCs	Fluet	Staff
40	Strategy	Expansion/Investment	New Model/Programs	Multireligious Interfaith	Kaloyanides	Staff
41	Strategy	Expansion/Investment	New Model/Programs	New Configuration of EDS, DL Dean, Spiritual Direction	Yaghjian	Faculty
42	Strategy	Expansion/Investment	New Model/Programs	Teaching Global Theologies Task Force	Roberts	Student
43	Strategy	Expansion/Investment	New Model/Programs	Education Distribution Service	Mulligan	Staff
44	Strategy	Expansion/Investment	New Model/Programs	Women LGBTQ (Global)	Kodera	Alum
45	Strategy	Expansion/Investment	New Model/Programs	Transforming EDS	Radtke	Trustee
46	Strategy	Expansion/Investment	Summer Programs	Summer Residency	Richards	Alum
47	Strategy	Reductions	Savings	Austerity Measures	Nilsson	Trustee