

## **Chancellors' Report - 2018 Diocesan Convention**

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### **Resignation of Assistant Chancellor Kathleen Wells:**

Effective November 10, 2018, Kathleen Wells resigned her position as Assistant Chancellor. With some reluctance and great appreciation, Bishop Mayer accepted the resignation for the reasons given by Kathleen. Chancellor Sandy Liser joins the entire Diocese in our expression of gratitude for the extreme hard work and devotion given by Kathleen through her tenure as Chancellor and then Assistant Chancellor.

### **Assistance to Diocesan Entities:**

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

- Standing Committee
- Corporation Board
- Executive Council
- Finance Committee
- Management Committee
- Risk Management Committee
- Constitution and Canons Committee
- Ecclesiastical Discipline
- Served as Convention parliamentarian (Assistant Chancellor Greenhill)

### **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, relocation, elections, vestry requirements, bylaws, incorporation of related entities, school issues, leases, and title to property.

### **Assistance in Litigation:**

- Counsel of record in Tarrant County/Texas Supreme Court/U.S. Supreme Court; Hood County (Brants Trust); Wichita County (Burns Trust) litigation (Assistant Chancellor Wells)
- Assisted, coordinated with outside counsel for the Diocesan parties, counsel for Episcopal Church, counsel for congregations in litigation (Assistant Chancellor Wells)
- Monitored Diocese compliance with supersedeas order, including maintenance of property and expense reporting

### **Other Activities:**

- Coordinated with Bishop and Canon plans for forming effective plan for future of Diocese after the property litigation is concluded
- Actively participated in Constitution and Canons Committee and the Corporation.

### **Pending litigation:**

- No. 141-237105-09; *The Episcopal Church, et al v. Salazar, et al* (141<sup>st</sup> District Court, Tarrant County, Texas). No. 02-15-00220-CV; *The Episcopal Church, et al v. Salazar et al* Court of Appeals, Second District of Texas Fort Worth. No. 18-0438; *Franklin*

*Salazar, et al v. The Episcopal Church, et al*, Supreme Court of Texas. Received very favorable opinion from the Fort Worth of Appeals on April 5, 2018; Analyzed opinion and its affect, assisted in strategy for the ongoing appeal, analyzed the Petition for Review filed by Jack Iker's attorneys in the Supreme Court of Texas and assisted in the preparation of the Response to the Petition for Review.

- No. C2009233; *Ronald D. Wenner, Trustee of the Cynthia Brants Charitable Reminder Unitrust v. The Episcopal Diocese of Fort Worth, et al*; 355<sup>th</sup> 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, pending resolution of Tarrant County diocesan case)
- 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, pending resolution of Tarrant County diocesan case)
- No. 177,121-C; *In Re Lillian M. Burns Trust*; 89<sup>th</sup> District Court, Wichita Falls, Texas (trust terminated, trustee severed out, remaining claims (abated)

### **General Convention of The Episcopal Church in Austin, Texas**

- Assistant Chancellor Kathleen Wells attended as a deputy on behalf of the Diocese of Fort Worth and served on the Constitution and Canons Committee
- Chancellor Sandy Liser attended for several days to become acquainted with the procedures and the resolutions being considered
- All chancellors attended the Chancellors' Dinner with other chancellors from The Episcopal Church
- Chancellor Sandy Liser is working with Bishop Mayer and the Diocese in response to various resolutions which were passed and which directly affect this Diocese

### **Goals for 2019:**

- Select new Assistant Chancellor due to the resignation of Kathleen Wells
- Form effective attorneys group in various legal specialties
- Continue work to secure favorable determinations in pending diocesan litigation
- Continue to work toward transparent, participatory and accountable governance in diocese and congregations

Respectfully submitted,

Sandy Liser, Chancellor  
Kathleen Wells, Assistant Chancellor  
Bill Greenhill, Assistant Chancellor