

Special Investigative Task Force (SITF) Report & Recommendations Oct. 28, 2017 for the Regional Church Council (RCC), Christian Church in Ohio

The context:

A number of complaints were filed at the March 25, 2017 Regional Church Council meeting in reference to Rev. Dr. William Edwards. Six letters signed by a total of 34 individuals, most but not all ordained ministers of the region, were presented with two intentions common to all six: to ask for disciplinary action against Dr. Edwards over various matters, and to call for his resignation or other personnel action against him. His retirement on March 24 rendered that aspect of the complaints moot, but the assertions that there were matters rising to the level of calling into question Dr. Edwards' ministerial standing still required review.

Our role:

Per page IV:15 in our Ohio Commission on Ministry Public Manual, under the heading "Procedure for Termination of Standing" when any incoming "situation is reported" the point of contact is "the Regional Pastor and President," with the general implication that the chair of the Commission on Ministry would function as a secondary point of contact (further references are simply to "the Commission shall"). Given that Dr. Edwards was functioning as de facto chair of the Commission on Ministry, the complaints came directly to the RCC, which quickly moved to create the SITF for review and recommendations stemming from the concerns raised. The SITF has operated under the Christian Church in Ohio Bylaws, Article IV, Section 2, part a), that the Executive Committee under the guidance of the Regional Moderator is our accountable partner as we work towards a just and equitable conclusion of our investigation.

Our process:

The Special Investigative Task Force (SITF) has met three times in person & during a five month period corresponded with each other on information gathering and document review, waiting to include the regional financial review by Wells, CPA. Complainants and named affected parties have been given opportunities to add to the presented record.

Complainants offered the following concerns:

- That Dr. Edwards was brusque & uncommunicative in his professional actions as Regional Pastor & President;
- That Dr. Edwards was engaged in an inappropriate relationship with a member of the regional staff;
- That Dr. Edwards unjustly favored that staff member in financial considerations stemming from his oversight of regional processes and budgets;
- That Dr. Edwards was a poor steward of the region's financial assets, possibly misusing those assets for himself or others.

These four points are the SITF's attempt to summarize the diversity of concerns raised in the complaints on file with the RCC.

Our response is as follows:

- Dr. Edwards had a pastoral style which created negative impressions for some. To call his approach to pastoral relationships unethical or unprofessional does not appear to be supported by the facts available to us. That they were not effective in this setting is already evidenced by the request for resolution presented by the Personnel Committee of the RCC before Dr. Edwards' retirement, hence this matter is to be considered resolved.
- Both Dr. Edwards and the staff member named as being in an inappropriate relationship have strenuously denied that there was any personal relationship until on or after March 1, 2017. There is no clear and compelling evidence before us to contradict this assertion, which therefore must be allowed to stand.
- We have extensively reviewed the New Church Committee minutes as far as possible, going back to 2011, to determine if special considerations or unfair dealing was evident between Dr. Edwards' actions and said staff member. We find none.
- The regional finances are in a condition that is indeed troubling. Deficits and shifts of funding to deal with declining income that consistently was far below expenditures were obscured, perhaps, but not hidden. A fair and thorough review of the RCC minutes and the financial records, going back almost a decade, reveal a consistent pattern of deficit spending and unsupportable withdrawals from invested and reserve funds. From the thorough financial review by Wells, CPA and our own researches in the regional archives, minutes, and records, what becomes startlingly clear is that our region has had no real system of financial accountability, particularly for trust funds, for quite some time.

We present the following three negative recommendations, and three positive recommendations for the consideration of the Executive Committee and the RCC:

- That Rev. Dr. William Edwards be admonished for his willful indifference to the appearance of impropriety in his relationships with staff, which damaged both staff effectiveness in regional work, and his own stature and authority in the practice of his ministry. If he had been more willing to work with reasonable guidance offered, in a Biblical manner, by a trusted regional moderator, by a pair of honored regional leaders, and finally by the appropriate accountability body (in this case the regional Personnel Committee), some of the negative perceptions of otherwise appropriate actions could have been avoided.
- That the Regional Church Council be admonished for its willingness to approve poorly supported actions relating to trust accounts and expenditures in the face of clear deficits versus income, operating on more wishful thinking than faith, and choosing not to look at hard facts that were presented to them, even if they were softly pedaled through the budget process.

- That the Christian Church in Ohio, as a regional body in covenant together, be advised of a long-standing pattern and practice of allowing expenditures to exceed income, and admonished for the expectation of regional staffing to provide services and support far beyond the financial support given those ministries by the member congregations.

The positive recommendations we would offer are:

- We would recommend that the regional office maintain a formal official record of minutes for the RCC and its functional commissions and task forces, with the authority to review and request clarification before filing them as an official record. It would also be both prudent and useful for a “motion book” be prepared and backed up, as a record of the approved actions of the RCC. Our regional policies are almost entirely an “oral tradition.”
- Detailed investigation into the formal written record has resulted in the conclusion that we as a region have no trust policy for gifts, no RCC approved policies and procedures for the Commission on Ministry, and no conflict of interest policies for committees responsible for distributing funds. We must have them.
- That the Christian Church in Ohio, having failed to maintain trust accounts and permanent funds given with designated intentions in good faith, will commit to placing such gifts in the future with a trusted third party such as the Christian Church Foundation, so that permanent funds as given may be preserved and donor intention be honored in any future gift the region might receive.

A longer complete report was presented to the Executive Committee, and will be placed in the regional office archive with a copy to the Disciples of Christ Historical Society. The length of the full report is largely due to the significant uncertainties encountered in ascertaining what “policies and procedures” were actually in place as official for the Christian Church in Ohio, the RCC, or any commission or task force of the region over the last two decades. We deem necessary the inclusion of the documents we used as our “good faith” basis of assessment as to regional policies and procedures, in order to create a clear and comprehensive public record.

In closing, as there are many details still to be clarified from past regional operations, we would state for the record that our task force has done a procedural review, not an evidentiary investigation. However, if anyone were to ask for a criminal investigation or a detailed financial audit, it is our considered opinion that such a request would be spending money the region does not have to seek evidence that does not exist. We are confident that money was not personally appropriated by any individuals under false pretenses; we are also confident that the Christian Church in Ohio can learn from and overcome the hazards, often self-imposed and internally created, that have brought us to a place of humility and reassessment.

[Regarding the some \$1,700,000 withdrawn from investment accounts; our pragmatic review of the basic fiscal documents presented to the RCC for the end of each year during this period:

Regional year end summaries using "Total Income – YTD Actual" & "Total Expenditures – YTD Actual"

2000	In	1,474,749	
	Out	1,455,432	+ 19,317
2001	Not available		
	Keep the Fire Burning		
2002	Not available		
2003	In	2,360,490	
	Out	2,319,499	- 40,991 (after special gifts from campaign of \$225,000* vs. deficit)
2004	In	2,725,919	
	Out	2,362,046	- 363,873 (est. – some \$800,000 from KTFB is deposited, but later moved)
2005	In	1,507,721	
	Out	1,820,144	- 312,423
2006	In	913,551	
	Out	1,603,402	- 689,851 (adjustments made between 2005 & 2006)
2007	In	1,476,394	
	Out	1,638,749	- 162,355
2008	In	1,631,048	
	Out	1,657,288	- 26,240
2009	In	1,403,957	
	Out	1,538,944	- 134,987
2010	In	1,160,692	
	Out	1,396,921	- 236,229
2011	In	1,089,742	
	Out	1,396,843	- 307,101
2012	In	1,057,625	
	Out	1,343,573	- 285,948
2013	In	1,174,495	
	Out	1,401,467	- 226,972
2014	In	1,003,451	
	Out	1,300,459	- 297,008
2015	In	999,517	
	Out	1,240,969	- 241,452
2016	In	1,046,589	
	Out	1,135,836	- 89,247
2017	In	548,663 (to June 30)	
	Out	576,384- 27,721	
Total deficit spending:			- \$1,711,678 (over seven & one-half years from 2010) Annual average deficit: \$228,224
			- \$3,642,615 (over 14 & one-half years from 2003) Annual average deficit: \$251,215*