



THE EPISCOPAL DIOCESE OF VIRGINIA

The 227th Annual Convention of the Diocese of Virginia

November 11-13, 2021, Crystal Gateway Marriott, Arlington, VA

Related Organizations Nomination Form

Nominee for:

Diocesan Missionary Society

Virginia Diocesan Homes

Trustees of the Funds

Bloomfield

Name Carter "Kerry" Kelly Wade

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Phone 703-671-3609

City/State/Zip Alexandria, VA 22311

Church Name, Location Immanuel Church-on-the-Hill, Alexandria, VA

Has the nomination been endorsed by the Related Organization? YES: _____ NO: _____

Are you a confirmed adult communicant in good standing of an Episcopal Church in the Diocese of Virginia? YES: X NO: _____

Your church's Clergy Signature: The Rev. J. Randolph Alexander

Additional information to be provided (please use a separate sheet to answer the following questions)

Professional/Educational Background:

Church Involvement - Local, Diocesan, National:

Pertinent skills you bring to this work:

Why do you wish to serve?

Signature Carter Lee Kelly Date 7/16/21

PLEASE NOTE: Nomination forms must be received no later than the close of business on **Friday, September 10, 2021** in order to be reviewed by Annual Convention. Please send completed nomination forms to: Secretary of the Diocese, 110 W. Franklin Street, Richmond, VA 23220 Fax: 804-644-6928 E-mail: bmartin@thediocese.net

**Related Organizations Nomination Form -- Trustees of the Funds
Carter "Kerry" Kelly Wade**

Professional/Educational Background:

SUMMARY

Before retiring in early 2019, I worked for thirty-eight years in federal government relations -- most recently for Waste Management, Inc. representing the company before Congress and the Executive Branch. I spent most of my career working in energy and environmental policy in the private sector, as well as for federal and state government at the U.S. Environmental Protection Agency, as a Professional Staff Member, with the U.S. House Committee on Public Works and Transportation, and with the Florida Legislature's oversight and investigative staff.

CAREER HIGHLIGHTS

Waste Management, Inc., Senior Director, Federal Affairs, 2005-2019, Led teams of technical and legal experts to advocate environmental, energy and tax policy before Congress and the Executive Branch. Developed and executed regulatory compliance, advocacy, and communication strategies, built, and maintained professional relationships with key Members of Congress, staff, and federal executives. The work involved attention to context as well as detail.

American Chemistry Council, Senior Director and Team Leader, 1999-2005, Led and facilitated teams of technical and legal staff from member companies developing consensus environmental policy positions, and advocacy and communication strategies. Lobbied on behalf of the over 100 member companies in the chemical industry. Factual and convincing presentations were an essential element of this work.

Government Service -- U.S. Environmental Protection Agency, Special Assistant to Superfund Office Director, 1990-1995, Led and facilitated project teams to improve the operational efficiency of the Superfund, hazardous waste site cleanup program. **U.S. House of Representatives, Committee on Public Works & Transportation, Professional Staff Member, 1994-1995,** assisted members of Congress on legislative and policy issues regarding clean water, site cleanup and water infrastructure. **State of Florida Legislature Oversight & Investigations, Senior Analyst, 1984-1987.** Led teams of analysts evaluating Florida executive branch program implementation. Success in these endeavors involved maintaining clarity and focus while dealing with complex issues.

**Related Organizations Nomination Form -- Trustees of the Funds
Carter "Kerry" Kelly Wade**

EDUCATION

Master of Public Affairs, Lyndon B. Johnson School of Public Affairs, University of Texas at Austin, 1981

Bachelor of Political Science and Public Administration, University of Florida at Gainesville, 1979

Federal Executive Training Program, Leadership and Management Training for the Senior Executive Service, 1994-1995

Education for Ministry, Theological Training, 2017-2021, School of Theology, The University of the South

Church Involvement:

The Falls Church, Episcopal, 1994-2006, served as a volunteer for the Guild of the Christ Child, working with infants and toddlers during services to provide childcare while parents were worshipping.

Served as a lecturer, mentor, and small group facilitator for the Falls Church Jobs Ministry, providing advice, and practical skills for building a career network, interviewing, and preparing a resume for parishioners and community members in job transition or seeking a career change.

As a member of **Immanuel Church-on-the-Hill, the parish church of The Virginia Theological Seminary, 2007-present**, I served as Church Register, Vestry Member, and for seven years as **Chair of the Stewardship and Planned Giving Committee**. During my tenure as Chair, the Committee:

- Revitalized the annual All Members Pledge campaign with a narrative budget describing parish mission and spending and developed yearly pledge packets and follow-up communications.
- Facilitated parish meetings to brainstorm ministry and budget priorities to inform both development of the operating budget and the stewardship campaign.
- Created an on-line pledging and volunteering page for the parish website including a self-evaluation survey to identify gifts and talents geared to church ministries.
- Reinstated a parish planned giving program with thank you and outreach receptions, seminars, and a website with estate planning information and descriptions of planned giving vehicles such as Charitable Remainder Trusts and Donor Advised Funds.

**Related Organizations Nomination Form -- Trustees of the Funds
Carter "Kerry" Kelly Wade**

I am serving as **Secretary of the Board of Trustees for the Immanuel Trust Fund**. The Trustees are responsible for overseeing the management of invested funds and the disposition of bequests, monitoring, and approving annual distributions from the Fund, and working with the Vestry to ensure expenditures comport with the Trust Fund Policies and Guidelines. The Board also works with the Stewardship and Planned Giving Committee to advocate for a comprehensive planned giving program to encourage gifts, grants, bequests, and other legacy gifts to the parish. The Fund comprises two true endowment funds and a quasi-endowment. The assets of the Immanuel Trust Fund are invested with the Trustees of the Fund.

As Chair of the Stewardship and Planned Giving Committee, I oversaw the consolidation of three pre-existing funds, and their diverse guidelines and policies into one Trust Fund with a single set of policies governing investment, spending, disposition of bequests, donor-designated funds, and gift acceptance. The new set of policies and guidelines, which provide the Vestry and parish with transparent and comprehensive management rules, were adopted by the Vestry, reviewed by the Episcopal Church Foundation (ECF), and conform to the Virginia Uniform Prudent Management of Institutional Funds Act (UPMIFA).

Pertinent Skills:

Over the last twenty years I have managed my own portfolio of savings with the expert help of a certified financial planner and stockbroker. My portfolio includes my savings for retirement as well as a Donor Advised Fund that I have used to make my charitable contributions for more than a decade, and a new Charitable Remainder Trust which I established last year. While investment management is not my area of education or professional expertise, my own financial advisors have taught me to be an intelligent consumer of those services. In addition, my four years of work as a Trust Fund Trustee have given me an appreciation for the needs of a parish as it balances its desire to protect and grow its assets, while also creating and disbursing income to further parish ministries. I believe this would be a valuable perspective for the TOTF as it works to provide professional funds management services, as well as a responsive and positive customer experience for its clients.

My professional work in regulatory management and advocacy required me to be proficient at reading and understanding complex statutes and regulations to identify operating requirements and compliance challenges for my employers. I worked within teams of lawyers and operational experts to develop compliance strategies, identify implementation barriers, and formulate educational and advocacy strategies to work with state and federal regulators to interpret or modify regulatory requirements. The regulations involved environmental management, renewable energy production and marketing of environmental credits, inventorying and reporting greenhouse gas emissions, and tax policy. I believe my regulatory skills would be valuable to the TOTF Board as it evaluates governance issues or provides advice to its clients regarding the management of their funds.

**Related Organizations Nomination Form -- Trustees of the Funds
Carter "Kerry" Kelly Wade**

I was raised as a Navy Junior with roots in Northern Virginia. Through my marriage to the Rev Dr. Francis H. Wade I enjoy relationships with two grown children and five grandchildren. My life is enriched by reading, travel, exercise and a network of friendships. This year will be my second serving on the Flower Guild of the National Cathedral and I will be completing four years of theological education through the Education for Ministry curriculum.

Why do I wish to serve?

I have enjoyed my stewardship, planned giving, and trust fund work at Immanuel and would like to deepen my ministry by working at the diocesan level. My financial stewardship activities have been rewarding at the parish level because they have enabled Immanuel to better serve parishioners and our mission and ministries in Alexandria and beyond. I would like to help other churches and organizations do the same by providing advice, support, and good financial management services through the work of the TOTF. I believe I could be an effective advocate of sound financial management to existing and potential clients of the TOTF.