



THE EPISCOPAL DIOCESE OF OLYMPIA

# *Clergy Manual*

Revised  
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# WELCOME TO THE DIOCESE OF OLYMPIA

## WEBSITE

This manual and much other useful information can be found on the Diocese of Olympia website at [www.ecww.org](http://www.ecww.org).

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## *A Message from the Bishop*

*Dear Clergy Colleagues,*

*We have prepared this manual in the hope of having one place which you can go to find much of the general information which will help you in your ordained ministry while serving in the Diocese of Olympia. As with any document, this one will always be evolving. It is my hope that you will make suggestions and share concerns when they arise so we can continue to perfect it.*

*As is stated in several other places in this document you can also find much of this information on the diocesan website and some on my blog, [www.bishoprickel.com](http://www.bishoprickel.com).*

*Blessings,*

*The Rt. Rev. Gregory Rickel  
Bishop of Olympia*

**CADO- The Clergy Association of the Diocese of Olympia** is an association for ALL the clergy in the Diocese. All clergy are automatically members and are invited to our events.

We do ask members to pay dues which help us defray some administrative costs as well as give the individual membership in NNECA - The national Network of Episcopal Clergy Associations(at a reduced rate). This includes their newsletter Leaven.

### **Our Core Values**

**Collegiality:** We are committed to helping establish and nurture solid relationships between clergy that are inclusive, that encourage shared decision making, that develop a shared vision and purpose, and that honor clerical diversity.

**Wholeness:** We are committed to providing resources that inspire clergy to focus on and work toward a wholeness of the entire person that is a witness to and a model of the fuller living reign of God.

**Formation:** We are committed to providing opportunities to enhance the growth of every clergy person, helping each to serve Christ and the world through the unique ministry of the ordained with intention, compassion, and integrity.

For more information, please check our website at: [www.ecww-clergy.org](http://www.ecww-clergy.org)

# Expectations for Ordained Leaders in the Diocese of Olympia

We seek persons who:

Are spiritually grounded and Christ-centered;

We seek persons who have a practiced life of prayer, can articulate their faith in a way that draws others into “The Story,” and who find strength in the Christian community and their own personal spiritual journey. We seek persons who are culturally aware and have a deep appreciation and experience with diversity. We seek persons who have a rule of life and experience in receiving spiritual direction, and are willing to continue this path throughout their life.

Have a proven gift of gathering and developing a community;

We desire ordained leaders who have an entrepreneurial spirit and can articulate a proven history of connecting, inviting, inspiring and unleashing the gathered body as well as the capacity for developing that body toward greater health and faithfulness over time. They demonstrate an ability to effectively articulate their faith verbally and in writing in a way that forms those to whom their words are addressed. We seek persons who have a deep love for the Church and a missionary heart for, and are grounded in, congregational life.

Practice Christian stewardship;

We seek persons who can articulate clearly their stewardship journey as it relates to money, resources and relationships, and who personally practice the tithe and are willing to be a living witness to it in their communities.

Demonstrate emotional maturity;

We seek clergy who are aware of who they are and their impact on others in their personal relationships, in their role as leaders in congregations, and in any role they play in the work of the diocese or the broader Church.

And understand authority.

Our clergy have a clear ability to be in touch with their own authority and respect the role of authority that is unique to our Anglican/Episcopal identity. They have a firm understanding of the polity of the Episcopal Church.

# EXPECTATIONS OF ALL CLERGY

## Definition of “Clergy”

This manual applies to all Episcopal clergy who function in the Episcopal Diocese of Olympia, whether deacon, priest, or bishop, active or retired, licensed or canonically resident, parochial or non-parochial, full-time, part-time or bi-vocational, residing within the diocese or elsewhere.

## Membership in the Clerical Order

Clergypersons are not members of congregations. By virtue of their ordination, they are listed on the Roll of Clergy of the diocese, under the authority of the bishop, and are not eligible for participation as lay people in the local congregation.

## Clergy Orientation

All clergy new to the diocese, whether licensed or canonically resident, will be invited to FreshStart, an orientation program. Participation in FreshStart is required. Fresh Start is a Credo-originated program required for all clergy newly ordained, or new to this diocese, or for first time rectors/vicars. It's focus is to provide training in a wide range of practical, personal and pastoral skills for parochial responsibility in this diocese. Fresh Start gatherings also offer a major venue for peer-learning and collegiality.

Also, if you are new to the diocese you will be provided a mentor by the Bishop's office. These are priests who have been resident in this diocese and have agreed to serve in this capacity. We would like to give each ordained person coming into the Diocese of Olympia a mentor/friend to be associated with from the very beginning of their ministry and time here. This page is designed to give you the basic expectations of this relationship.

1. It is hoped that the mentor would initiate an initial face to face meeting with the newcomer.
2. After that initial meeting, it is up to the newcomer to initiate and request further meetings and both will work on the nature of the connection, i.e. regular monthly meetings, only as needed, etc.
3. The idea is to stay in touch by calling, emailing, meeting face to face as you “find your feet” here.
4. Typically, these relationships are necessary and helpful for the first 6 months or a year. However, you are free to continue this connection as long as you find it helpful.

5. There are no budgeted funds for this program, however, if you find need of some to make this a reality please contact the Bishop's office.
6. Either person in this relationship, mentor or newcomer, could make a decision that the pairing is not a good one and request a change.

## **Coaches**

Some may want or need a deeper connection and we would call these coaches.

These are experienced priests who have had training and would offer their service as (volunteer) Life Coaches. They are ready to be your companion on the way, to listen, and to hold you accountable to your stated goals which they can help you clarify. Their relationship with you is confidential, and the terms and the conditions of that relationship are set by mutual agreement. Coaches have some information to answer questions, but their work is primarily about helping you set, take steps toward and reach the goals you set for your life in ministry. Coaching meetings will usually be by telephone, but if you would like to meet in person or by teleconferencing, that can be negotiated between you and your Coach. The Bishops' Office can give you names of people who have taken the training. Coaching is especially valuable for those making transitions, those seeking changes in their life and ministry, those going into uncharted waters (capital development, new ministries, etc.) and those who want to develop ministry skills. The Office of the Bishops can give you names and phone numbers of those who have taken the training.

## **Sexual Abuse Prevention**

All clergy are required to be trained in the program *Safeguarding God's Children*.. No other training programs are acceptable, and the training is mandatory. All clergy licensed or canonically resident in Olympia are required to have this certification in their file in the Bishop's Office no later than August 1, 2010. Clergy who do not have this certification by that time will have their license revoked, or be inhibited until such certification is provided. This training must be renewed every five years. If you feel that you have equivalent training please discuss this with the Canon to the Ordinary.

All clergy are expected to be conversant with diocesan policies on sexual misconduct. All clergy are responsible for articulating, supporting, and educating about diocesan abuse prevention policies in the local setting.

The only clergy who may be exempted from these requirements are retired clergy who certify to the bishop that they are completely retired and do not exercise their ordained ministry in any context.

### **Continuing Education**

Canonically, all clergy must meet a continuing education requirement. The dean of the Diocesan School of Ministry and Theology is the bishop's agent for determining fulfillment of this requirement.

A limited amount of scholarship assistance is available from the Office of the Bishop. Every clergyperson should receive at least two weeks each year and an allowance for the fulfillment of this requirement as part of their Letter of Agreement.

### **Discretionary Funds**

All clergy are expected to know and follow the Diocese of Olympia policy on the use of Discretionary Funds. Failure to comply with this policy may result in ecclesiastical discipline.

### **Identification of Candidates for Ordination and the Commission on Ministry**

Our baptismal covenant affirms the ministry of all baptized persons. Our catechism further identifies the orders of priesthood diaconate and episcopacy as particular avenues of ministry. While it is the role of the Bishop to ordain clergy (priests and deacons), the National Canons provide for a Commission on Ministry (COM) to advise and assist the Bishop(s). One primary task of the COM is to help congregations and the wider Church identify those gifted for ordained ministry, and to advise and assist the Bishop in discernment of vocations to the priesthood and diaconate. Your COM consists of no fewer than 10 members, representing all orders of ministry, appointed by Bishop Rivera. In addition, the Secretary for Vocations serves as staff to the COM.

All clergy are to nurture possible vocations to ordained ministry, being attentive to persons in the local setting who may have such gifts. In accordance with the national canons of the Episcopal Church, the Diocese of Olympia will only consider for ordination individuals who have been nominated by parishes, missions, or campus ministries. You may refer to the document above, *Expectations for Ordained Leaders in the Diocese of Olympia* as these are the criteria we will be looking for in candidates presented.

Clergy also have the responsibility for redirecting aspirants whose gifts do not suggest an ordained vocation, rather than nominating candidates who are unlikely to be accepted at the diocesan level. Please consult the diocesan website for the most recent published materials on the discernment process as it is practiced in this diocese. For specific questions and for further information please contact the Secretary for Vocations at [Vocations@ecww.org](mailto:Vocations@ecww.org) or 206-325-4200 x2017. If you have an aspirant and would like to start a discernment committee, it is imperative that you contact the Secretary for Vocations so a COM member may be assigned to consult before the committee begins. You may also contact the convener of the

COM (Rev. Kathleen Patton: [mokpatton@comcast.net](mailto:mokpatton@comcast.net) or 360-423-5600) to discuss any of these matters.

## **Deployment**

Any clergy person in the Diocese who is canonically resident or licensed and in good standing may submit their name and material to any congregation receiving names.

Updates of the congregations in transition will be published monthly and send to all clergy who are receiving PIE.

The Bishop may submit to the congregations in transition a list of nominees to the position and these nominees will be receive telephone interviews by the Call committees.

Any clergy person moving from one congregation to another must be current on all required trainings on the prevention of abuse of children and the prevention of sexual exploitation and harassment in congregations.

Questions about deployment are properly directed to the Canon to the Ordinary.

## **Clergy Wellness**

For your own sake, and for the sake of the mission of the diocese, we expect you to attend to your physical health, your emotional and spiritual wellness, and your personal relationships.

You are encouraged to participate in a peer support group.

The health and well being of the clergy of the Diocese is part of a larger package of benefits and programs available to each clergy person. The Diocese requires a sample Letter of Agreement for Rectors, Vicars, Associates, Assistants and Priests in Charge. In this letter of agreement congregations are required to provide Medical and Dental Insurance, Sick Leave, Pension, Professional Development time and funds, and Sabbatical planning. These letters of agreement also provide for annual vacation and a variety of National Holidays. In addition the Diocese sponsors a number of clergy days each year designed to foster collegial relationships as well as for learning. Clergy are also encouraged to participate in regional Clericus groups. The Church Pension Fund in connection with the Diocese provides both Short and Long term disability coverage.

There is available through the office of the Bishop a Clergy Emergency fund which is available to meet unexpected financial emergencies. Application is made to the Bishop or to the Canon to the Ordinary. Also available are funds for Theological Education, often used to partially fund sabbaticals for clergy. A policy of continuing education and its funding is presently in development.

### **Diocesan Participation**

The clergy have a canonical responsibility to participate in diocesan activities, to serve on diocesan boards and committees, to attend clergy conferences called by the bishop, and to attend Diocesan Council. Such participation is considered to complement local duties, not to conflict with them.

Clergy are also expected and encouraged to identify local lay leaders whose gifts may be suitable for diocesan leadership and to commend them to the bishop for possible appointment to various diocesan ministries.

### **Immigration Matters**

Clergy who are not citizens of the United States are required to have official permission to work before they may be deployed in this diocese. Non-citizen clergy are required to provide satisfactory documentation of their immigration status to the Canon to the Ordinary, to cooperate in resolving any questions about their status, and to inform the Canon of any changes in their status.

### **Relationships Between Clergy of Different Congregations**

Clergy who are settled in a particular cure are expected to exercise pastoral oversight and care of persons in their given cure. To intrude, uninvited, into the cure of another clergy person is a significant breach of professional ethics. This proscription applies to retired and non-parochial clergy as well as to clergy with cure. If such a pastoral relationship is established, the clergy person with oversight must be informed.

### **Constitution and Canons**

All clergy are expected to be familiar with the content of the *Constitution & Canons of The Episcopal Church*, the *Constitution and Canons of the Diocese of Olympia*, and the by-laws (if any) of the local congregation.

### **Letters of Agreement**

It is expected in every situation in which a cleric is employed by a congregation that a letter of agreement will be executed by all the appropriate parties and a copy sent to the Bishop's Office for the files there. You may find samples letters of agreement which contain the items the Bishop insists will be in each of these at this link <http://www.ecww.org/index.cfm?id=DeploymentDocuments>

## **EXPECTATIONS OF HEADS OF CONGREGATIONS**

### **Definition of "Heads of Congregations"**

This category includes all rectors, vicars, interim rectors, interim vicars, priests-in-charge, or any other person in charge of a congregation.

### **Values, Mission and Goals**

In addition to personal wellness, Heads of Congregations are required to attend to the health of the congregation in their charge. It is the responsibility of the Head of Congregation to assure that the congregation articulates its values and mission and sets appropriate goals that both focus its life and work and provide a basis for evaluation. Diocesan resources are available to assist in this process.

### **Instruction in the Faith**

Heads of Congregations are required to provide for appropriate instruction in the Christian faith for persons inquiring and for the spiritual development of congregational members.

### **Mentoring of New Clergy**

Each newly ordained clergy and all clergy newly canonically resident in the Diocese of Olympia will be assigned a mentoring priest trained by the Office of the Bishop to serve in this capacity.

### **Parish Administration**

There are a variety of administrative matters that fall to Heads of Congregations, including oversight of the maintenance of parish records, personnel matters, abuse prevention programs, requests to the bishop for lay licensing for various ministries, and completion of the annual Parochial Report and its attendant schedules. Heads of Congregations are also responsible for seeing that Parochial Reports (Due February 1<sup>st</sup>), annual audits (Due September 1<sup>st</sup> for prior year), and NDI calculations (Net Disposable Income, due February 1st) are completed and submitted to the diocesan office

Heads of Congregations are charged with the supervision of all staff, whether clergy or lay. They are to assure that each lay employee has a personnel file that contains an application, appropriate background and reference checks, IRS form W-4, and an I-9 form as required by the Immigration Reform and Control Act.

They are to provide for the regular review and evaluation of all staff and to document this process in the personnel files, which are to be kept in locked cabinets in the church offices.

Personnel files for clergy are maintained by the bishop, who is also responsible for clergy background checks.

If Heads of Congregations receive reports of sexual misconduct or abuse, they are immediately to inform the bishop and receive instructions before taking action. The only exception is to report immediately any allegation of child abuse to authorities and remove the person accused from any contact with children. While the vestry or bishop's committee is canonically responsible for financial matters, the Head of the Congregation has a fiduciary responsibility to ensure that appropriate insurance coverage, financial reporting capabilities, and financial

internal controls are in place, as well as assuring compliance with diocesan requirements regarding audits.

It is the responsibility of the Head of the Congregation to consult with the Board of Directors of the Diocese of Olympia before a congregation undertakes facilities renovation or expansion. The Diocese of Olympia holds title to congregational property and by canon must approve all such proposals.

## **EXPECTATIONS OF ASSISTING CLERGY**

Clergy who assist in congregations owe a duty of loyalty to the Head of the Congregation, at whose pleasure they serve. In the course of their ministry, they are to support the ministry, programs, and administration of the rector/vicar. Assisting clergy should have a Letter of Agreement.

In the event of serious disagreements between assisting clergy and rectors, every effort should be made to find resolution, and consultation should be sought if the two parties cannot resolve the situation satisfactorily. In any event, such matters are to be handled privately and without inappropriately involving members of the congregation.

If assisting clergy come to believe that they cannot offer the appropriate support to the rector, they are to contact the Canon to the Ordinary for consultation.

Assisting clergy are to comply with the policy on rector transitions outlined the canons of the church.

## **EXPECTATIONS OF DEACONS**

If they are able to do so, Deacons are invited to attend the annual Clergy Conference.

In the Diocese of Olympia, the ministry of the Vocational Deacon will be expressed in this way:

1. The Deacon has a special servant ministry under the supervision of the Diocesan Bishop or the Bishop's designee. The Bishop will make all assignments for Deacons.
2. Deacons may be assigned to serve within a parish setting, within a diocesan institution, or within a secular setting. All deacons will be attached to a diocesan parish.
3. The Deacon is the bridge that interprets the needs and hopes of the world to the church and carries a particular concern for the poor and marginalized. But more importantly, also has the call and skills to facilitate ministry with and for others.

4. Most Deacons will continue their work at secular jobs or in the home.
5. Deacons will normally be non-stipendiary concerning their work on behalf of the church. All exceptions must be approved in writing by the Office of the Bishop.
6. The Deacon serves as an icon of servanthood within the liturgy. In doing so, the Deacon does not replace the ministry of Lay Persons. The Deacon reads the Gospel and bids the Prayers of the People. The Deacon serves at the Lord's Table, preparing and placing on it the offerings of bread and wine, and in assisting in the ministration of the Sacrament to the people. The Deacon dismisses the people at the end of the Eucharist to be Christ's ministers of reconciliation within the world. From time to time, it is also appropriate for the Deacon to preach in order to proclaim the gospel, to make the needs of the world known to the church, and to exhort God's people to do Christ's servant ministry in their day-to-day lives.
7. As servant leaders, Deacons will usually wear regular secular dress. To wear clericals is only appropriate when serving liturgically or when wearing clerical dress to facilitate ministry in the world (such as during some hospital or prison visits).
8. If a Deacon feels called to the Priesthood, he/she would have to begin an entirely new process.
9. The order of the Deacon must not be confused with the order of Priest. It is not consistent with the Deacon's call to be a head of congregation. There will be no "Deacon's Masses."
10. As stated in the Canons of the Diocese, Vocational Deacons will have voice and vote within the Councils of the Diocese.

### **EXPECTATIONS OF NON-PAROCHIAL CLERGY**

Clergy who are not employed by a congregation or institution of the diocese are considered non-parochial clergy. They are encouraged to participate in all activities of the diocese and must make the annual report required by the canons.

### **EXPECTATIONS OF RETIRED CLERGY**

Regardless of their ministry activities, or lack thereof, retired clergy are expected to continue to maintain an orderly relationship with the bishop. They should keep the bishop informed of any address change or any other major change in their circumstances.

Retired clergy who are canonically resident have seat, voice, and vote at Diocesan Council and are encouraged to participate if possible.

Retired clergy should be especially mindful of their responsibility to support the ministries of the active clergy in whose cures they reside or from whose cures they have retired.

## **EXPECTATIONS OF LICENSED CLERGY**

Licensed clergy are welcome in the diocese and are encouraged to participate fully in its life. Licensed clergy are subject to the same expectations outlined for all clergy. If they wish to be deployed as supply clergy, they must be conversant and in compliance with the policies of the Diocese of Olympia.

In addition, licensed clergy are required to make an annual report to the bishop and to request licensing for the next calendar year, if that is their desire. If no report and request for license is received, they will be removed from the list of licensed clergy and must reapply to be reinstated.

Licensed clergy serving as Heads of Congregations or as Assisting Clergy on the staff of diocesan congregations are expected to register for Diocesan Council. Although diocesan canons do not provide such licensed clergy a vote at Council, it is customary to grant them seat and voice when the Council organizes for business. Only those clergy who are canonically resident in the Diocese of Olympia may vote; other clergy have a vote in the diocese in which they are canonically resident.

Licensed clergy not serving as Heads of Congregations or as Assisting Clergy may register for Diocesan Council as visitors and are encouraged to do so.

ELCA clergy may be considered for license, if requested by a Head of Congregation. Such clergy must present, in addition to the standard licensing requirements, a letter from their bishop approving the license application. If they are not residing in their home synod, they must also have approval from the Lutheran bishop in whose synod they reside.

## **CLERGY NOT ORDAINED IN THE EPISCOPAL CHURCH**

### **Policy Regarding Participation In Congregational or Pastoral Settings**

Invitations to non-Episcopal clergy to serve on staffs, to participate in services, to preach or teach, or to lead any other activity must be considered carefully, and these policies must be followed. The Bishop's specific permission is required in

certain circumstances. Failure to observe these policies may result in ecclesiastical discipline.

### **Staff Members**

The bishop's specific permission is required to employ any ordained person on any basis. The specific duties that a non-Episcopal clergyperson will perform must be delineated in detail before approval is given, and no other duties may be subsequently assigned without the bishop's approval.

Such a clergyperson must function strictly as a layperson at all times while serving in this church. Such persons may not wear clerical attire or vestments other than those worn by laypersons, either in worship, at meetings or activities, or at any other time of participation in the life of the Episcopal Church.

The prerequisites for obtaining the bishop's approval are completion of a course of instruction about the Episcopal Church and a signed agreement to uphold the doctrine, discipline and worship of the Episcopal Church.

ELCA clergy licensed may exercise the same rights and privileges as Episcopal clergy.

### **Volunteers**

If non-Episcopal clergy wish to volunteer for ministry in the Episcopal Church, the same policies apply.

### **Weddings and Funerals**

At your discretion, you may invite other qualified clergy to participate in the pastoral services described herein. You are never required to issue such an invitation. Qualified non-Episcopal clergy participating in a single pastoral service may wear the vestments that are customary in their tradition and may preside at the wedding, but not the Eucharist.

### **“Episcopal” or “Anglican” or “Continuing” Splinter Groups not part of ECUSA**

These groups undermine the geographical authority of the bishop as defined in the *Constitution and Canons* of the Episcopal Church and observed in historic Anglican practice. Therefore, no clergyperson from these groups may participate in any service of worship, and no joint services may be held. Episcopal clergy of the Diocese of Olympia may not participate in any service held in or by these congregations except with written permission from the Office of the Bishop.

# **THE EPISCOPAL DIOCESE OF OLYMPIA**

## **POLICY PROHIBITING SEXUAL MISCONDUCT**

*You will find the current misconduct policies on the diocesan website*

## **PASTORAL CARE AND SPIRITUAL DIRECTION**

1. Clergy are not to claim directly or by implication any pastoral or professional qualifications that exceed their actual qualifications or abilities. Clergy are expected to make appropriate referrals for matters that go beyond moral, spiritual, or religious guidance or whenever the needs of parishioners exceed those that can be competently handled by the clergyperson.
2. Clergy are to seek appropriate professional assistance for their own personal problems and conflicts, especially those that might impair their pastoral ability and judgment.
3. Clergy should not work in isolation but must be mindful of the need to maintain collegial and professional associations. It is necessary for the clergy to develop and maintain such associations for the purposes of maintaining supervisory skills, theological and spiritual insights, educational acumen, and current knowledge of resources for ministry. Forming a clergy support group is encouraged.
4. Reconciliation of a Penitent is a sacrament of the church. When hearing a sacramental confession (the rite of Reconciliation of a Penitent), it must be remembered that “the secrecy of a confession is morally absolute for the confessor, and must under no circumstances be broken.” However, if the penitent confesses to child sexual abuse, the confessor can and should withhold absolution until the penitent notifies the authorities.
5. Clergy should treat all pastoral conversations as confidential; however, if a person communicates an intention to harm himself, herself or others, this should be reported as appropriate.

6. Clergy must be familiar with and strictly comply with the diocesan policies regarding sexual misconduct including the requirement to report misconduct to the diocese and, if it involves minors, to the authorities.

## **DEPLOYMENT**

All questions regarding deployment should be directed to the Canon to the Ordinary.

In the Episcopal Church, clergy may be deployed only with the approval of the diocesan bishop.

### **The Search Process**

#### **Participation in Searches**

The bishop expects clergy to notify the Canon to the Ordinary when they are involved in a search process outside the Diocese of Olympia.

#### **Search Assistance**

The Canon to the Ordinary is available to assist clergy in deployment within and without the Diocese of Olympia. The Clergy Deployment Office (CDO) in the national church office is another resource. (*See Links*)

#### **Eligibility**

Eligibility for deployment in the Diocese of Olympia is determined by the bishop and based upon the individual's qualifications. Deployment is also dependent upon meeting the *Expectations for Ordained Leaders in the Diocese of Olympia and being willing to adhere to the other clergy expectations as well.*

#### **Staff Clergy Searches**

Always consult the bishop before calling any member of the clergy to join a staff.

In calling assistants from outside the diocese, early consultation with the bishop is strongly advised; clergy coming into the diocese become the responsibility of the bishop as well as the calling rector. The bishop may not accept Letters Dimissory if not consulted in advance.

#### **Deacons/Curates**

The bishop of the Diocese of Olympia makes all ministry assignments for deacons and curates.

A rector may not recruit or hire a seminarian, deacon, or a curate without the Bishop's permission.

Seminarians from outside the Diocese of Olympia are required to release their full canonical file from their sponsoring diocese before placement. This includes spiritual autobiography, postulancy letter, candidacy letter, psychological and physical

evaluations, evaluations and reports from Commissions on Ministry and Standing Committees. For assistance, contact the Canon to the Ordinary.

### **Expectations during Transition**

The bishop expects that once a clergyperson leaves a congregation he/she will bring closure to pastoral relationships with members of that Congregation. The health of the congregation is dependent upon how well this transition issue is managed. Former parishioners should understand from the clergy in a positive and affirming way that it is not appropriate to continue a pastoral relationship.

The bishop expects that the clergyperson will accept no further requests from members and former members to provide pastoral services at weddings, funerals, baptisms, or any other occasion of public worship for at least one year.

After one year, clergy may accept unsolicited invitations from the Interim Rector or Rector.

### **The Calling Process**

#### **Terms**

- a. *Priest in Charge* is the canonical term for a clergyperson in charge of a congregation who is not a rector or vicar. *Priest in Charge* refers to any priest exercising the rights and responsibilities of the rector/vicar during an interim.
- b. *Rector* is a term for the duly appointed-priest in charge of a congregation with all the rights and responsibilities as outlined in Title III, 9.5 and following. The *rector* shall have been appointed after the vestry and bishop have certified that he/she is duly qualified, duly elected, and has accepted election.
- c. *Vicar* is a term for a duly-appointed priest in charge of a mission congregation with all the rights and responsibilities as outlined in Title III, 9.5 and following. The bishop appoints a vicar.
- d. *Interim Rector* is a priest from outside the congregation who is selected by the vestry in cooperation with the bishop as the priest in charge and whose Letter of Agreement designates them rector for a period of time during a transition between rectors. An interim agreement may last for months or years depending upon the situation.
- e. *Staff Clergy* are priests who are appointed to serve as a member of a congregational staff and who serve at the pleasure of the rector.

#### **Documents of Call**

Three documents are part of the canonical appointment of a rector or vicar: the Letter of Call to the priest from the vestry, the Letter of Agreement between vestry and priest, and the Letter of Institution by the bishop. Priests in charge and Interims also shall have a Letter of Call and a Letter of Agreement. (*See Appendix H*)

#### **Ministry Covenants**

In addition to the Letter of Agreement with which incumbency is initiated, a Mutual Ministry Agreement between the rector/vicar and vestry/bishop's committee, or between

a staff clergyperson and a rector, will be completed within three months of the initiation of the relationship. This agreement must be signed by the bishop as well.

### **Canonical Residence**

In order to apply for canonical residence, clergy must have a full-time, stipendiary position (40 hours per week) at a church or institution of the Diocese of Olympia.

Clergy are required to present Letters Dimissory within three months of their appointment as rector/vicar. (Title III, 9.4)

The bishop will not accept Letters Dimissory until the hourly/stipendiary criteria is met, the bishop has determined that accepting Letters Dimissory is appropriate, and the Bishop has instructed the clergyperson to request them.

### **Letters Dimissory for Deacons**

Unless a deacon has been licensed in the Diocese of Olympia, they may not serve as deacon for more than two months.

Deacons may not transfer Letters Dimissory without written consent from the Bishop of Olympia. (Title III, 7.6)

### **Letters Dimissory for Interims or Retired Clergy**

The bishop does not accept Letters Dimissory for interim clergy or retired clergy.

### **Compensation and Review**

The Diocese offers, through the Canon to the Ordinary and the Treasurer's Office, consultation in determining clergy compensation based on a comparative model. Either vestries or clergy may request a comparison and review at any time.

### **Pension Contributions**

Participation in the Church Pension Fund by stipendiary active clergy is mandatory and is provided by the vestry through the parish budget.

### **Business Expenses**

Office and business expenses, including auto/travel allowances, are not a part of a clergyperson's compensation package. These expenses are a part of the church's cost of doing business.

### **Vacation/Leave/Sabbatical**

Clergy should have at least one day a week in which he/she has no scheduled duties or functions. Appropriate compensatory time is encouraged. The congregation should be made aware of the clergy person's scheduled time off (Sabbath time) and should be encouraged to respect it.

Episcopal clergy receive paid vacation of at least thirty days each year. There are no restrictions on how this time is spent.

Clergy are expected to devote at least fourteen days of each year to continuing education.

Provision should be made in every Letter of Agreement for clergy sabbaticals. In the negotiations leading to a Letter of Agreement, consideration should be given to prior service in the Church, the diocese and the current congregation. There are some sabbatical grants available through the Bishop's Office.

Time spent in prayer, professional study, spiritual retreat, and theological reflection is not considered "time off." Rather, such activities are essential to the exercise of a priestly vocation.

### **Deployment of Retired Clergy**

The Church Pension Group governs the salary retired clergy may earn. The bishop must submit an application for exemption from these guidelines.

All retired clergy active in ministry must meet the bishop's *Expectations of Clergy*.

### **Supply Clergy Policy**

The responsibility for finding supply clergy lies with vestries and bishop's committees. The Canon to the Ordinary maintains a list of supply clergy as a resource for congregations.

Non-parochial clergy and licensed clergy of the Diocese of Olympia are eligible to supply, provided that they are in good standing with the bishop and meet the *Expectations of Clergy*.

### **Interim Deployment**

All questions regarding interim deployment should be directed to the Canon to the Ordinary.

Candidates for interim positions within the Diocese of Olympia are expected to meet the bishop's *Expectations of Clergy*, regardless of canonical residence or active/retired status.

# CONTINUING EDUCATION FOR CLERGY

## CONTINUING EDUCATION GUIDELINES FOR CLERGY AND LAY PROFESSIONALS IN THE DIOCESE OF OLYMPIA

All active clergy are required to engage in continuing education, in accordance with Title III, Canon 7.5 for deacons and Title III, Canon 9.1 for priests.<sup>1</sup> Adherence to these national Canons is mandatory. Although there is no national canonical requirement for lay professionals to seek continuing education, the Diocese of Olympia believes it is also important for lay professionals<sup>2</sup> to continue to update their learning.

While this program is development in the Diocese of Olympia it is strongly encouraged that full time clergy receive 24 hours of continuing education a year.

## WORSHIP

### **Prayer Book**

The 1979 *Book of Common Prayer* is the standard prayer book for worship. *Enriching Our Worship* resources are also approved for use in the Diocese of Olympia. The Nicene Creed at primary Sunday services is not optional.

Heads of Congregations are to use their discretion in the use of any other worship resources and should notify the Office of the Bishop of uses of other materials.

Permission is granted for congregations to use current prayer books from other churches of the Anglican Communion.

### **Marriage and Remarriage**

Clergy are responsible for knowing the canons and requirements regarding remarriage and should initiate appropriate communication with the Office of the Bishop regarding remarriage. You may find the remarriage guidelines on the diocesan website at this link <http://www.ecww.org/OnlineDocuments.cfm>

## **Baptism/Confirmation/Reception**

*Baptism:* All persons who have received the sacrament of Holy Baptism with water in the name of the Father, Son, and Holy Spirit in this church or another Christian church and are duly recorded in the parish register are members of this church.

*Adult Members:* Members sixteen years of age and older are considered adult members.

*Confirmation:* Confirmation is the normative rite for adults who desire to make a public affirmation of their faith and commitment to the responsibilities of their baptism, following instruction in the faith of the church. *Adult confirmed members* are therefore those who have been baptized, confirmed, and are now at least 16 years of age.

*Reception:* (1) For adults who are baptized and who have been confirmed by bishops of churches in historic succession (2) Adults who are baptized and previously made a mature public commitment in another Church may be received or confirmed.

*Reaffirmation:* Adults who wish to reaffirm their commitment to follow Jesus Christ as Lord and Savior.

## **Episcopal Visitations**

Policies and procedures regarding Episcopal congregation visitations can be found on the diocesan website but most of it is also offered below:

### ***Bishop's Visitation Customary* *Diocese of Olympia* *Revised July 2009***

## **Introduction**

This customary is designed to help you plan for the visit of the Bishops. If any of this is unclear or if you would like to adjust these in any way please do not hesitate to call the Bishop's Office. We basically want you to utilize us in a way that is best for you so do not hesitate to ask.

The regular pastoral visitation of all parishes and worshipping communities of the diocese is among the principal responsibilities of the bishop's ministry among you. It is also one of the great delights of the episcopal office.

It is our desire for the pastoral visitation to be at once both business as usual and a special occasion in the life of the parish. In a liturgical-sacramental church such as ours, these are not competing interests. Our visitations ought not be "unusual" no matter how

infrequent. The central act of every visitation is the preaching of God's Word and the joint celebration of the Holy Eucharist with the clergy and people of the parish. All other aspects of the visitation are auxiliary and we must work to try not to have such things overshadow this central purpose.

Although we will continue to do confirmations, receptions, and reaffirmations during visitations, we do not believe these rites are the principal reasons for the Bishop's Pastoral Visitation. The availability of persons for confirmation or reception need not play any part in the scheduling of the visitation.

### **Scheduling**

Pastoral visitations will be scheduled in such a way as to balance the following priorities:

- the length of time since the last pastoral visitation.
- the need to schedule episcopal rites: major parish anniversaries, dedications of new buildings, groundbreakings, etc. (Some of these, of necessity will be scheduled on days other than Sunday)
- particular pastoral needs of the parish
- the celebration of the feast of title or other significant event in the life of the parish.

The scheduling of visitations may be initiated by the Rector or Vicar of the parish, or the Bishop's Office. As a general rule, we do not return to a parish for a regular pastoral visitation until all other parishes have been visited.

### **Our time with you**

We will make every effort to arrive no less than 30 minutes before the first service. Generally, the Bishops would like to offer themselves to be with you for Sunday visitations from 9:00 a.m. until 3:00 p.m. Whatever you would like us to do during that time we will do everything in our power to accommodate. However, if you have services earlier than 9:00 a.m., we will be happy to discuss adjusting our time with you. We can often come earlier and leave earlier, or vice versa. Please be in contact with us as soon as possible.

### **Meeting with the Vestry**

The Bishops expect a meeting with the Vestry which would include vision, mission, and goals for the congregation. It is also expected that the *Mission Insite* research will have been done, the report available, and a discussion of what has been discovered in this research. Please also review your challenges and accomplishments. This would be a time to also ask any questions of the Bishop from the congregation's standpoint and to ask for ways the Diocese could be more helpful to you in accomplishing your mission.

### **Liturgical Readings and Colors**

The readings should always be those appointed for the day—do not use the Confirmation readings except for a weekday visitation which is not a Holy Day. This will offer some variety for us in preaching as well. For confirmation the color should be red; for baptism with confirmation, the color should be white; for visitation by the Bishop without either baptism or confirmation, the color should be that of the season. For ordinations, the color is red.

### **The Liturgy of the Day**

We anticipate that all visitations will be celebrations of the Holy Eucharist. When there are no baptisms, confirmations, or receptions, the liturgy on the day of the pastoral visitation should include the renewal of baptismal vows. This should be substituted for the Nicene Creed at all services, even those that are otherwise Rite 1.

We are always happy to sing as much of the service as you desire. Please get this information to us well in advance.

To emphasize our pastoral relationship, we very much like wearing the vestments of the parish. We will bring a plain alb, mitre, and pastoral staff. We prefer to wear the chasuble for the entire liturgy. If you prefer the cope and mitre please let us know. For liturgies where we will only be preaching or performing other duties other than presiding at the Eucharist we can either wear the cope and mitre or rochet and chimere.

The Rector, Vicar, or usual Vestry appointee should make the necessary parish announcements. We will resume the presidency of the liturgy with the offertory sentence.

### **When there are Baptisms**

The Pastoral Visitation of the Bishop is one of the principal times for baptism and every effort should be made to make the visitation a baptismal feast, in contrast to an occasion for confirmations and reception.

In this service we prefer the presbyters do the water bath, and we, the bishops, will do the chrismation.

### **When there are Confirmations, Receptions, and Reaffirmations**

Sometimes there are questions of who should be confirmed, who should be received, and who should be reaffirmed. This is actually not as complicated as it might seem or as it once was. Changes made in the canons with respect to church membership by the General Convention of 1985, and refined in 1988, have made this fairly simple in practical application:

-Confirmation is for children who were baptized in the Episcopal Church or who came to this church with their families before making a “mature commitment”

-Confirmation is also appropriate for those of any age who are making a mature commitment for the first time.

-Reception is for those who have previously made a mature commitment in *any other Christian church*, regardless of the pedigree of the minister. The previous practice of receiving Roman Catholics and Orthodox Christians, and confirming everyone else, no longer applies. The requirement of *Called to Common Mission*, that we receive ELCA Lutherans and not confirm them, is not an exception to the canonical position, but is consistent with it.

Since the canons require that all persons come “under the hands” of the bishop, persons who are received are, for canonical purposes, understood to be confirmed.

When there is to be confirmation, reception, or reaffirmation at a parish visitation, candidates may come in any order. Name tags are preferable to cards to identify the name of the candidates.

In order to comply with the changes in the canons on church membership, the laying on of hands will be used for reception and reaffirmation as well as confirmation.

So, actually our canons made provision some time ago to receive far more adult persons than we are. If you have any questions about this please let me know.

### **Things we would like to see as part of the visitation**

We would like to look at the parish register and service record. We would also like to see all personnel files verifying that *Safeguarding God’s Children* certificates and proper background checks have been accomplished.

### **Bishop’s Chaplain**

Should a Deacon or a Canon of the Diocese attend, he/she shall be the Bishop’s Chaplain. The bishops do hope to bring a deacon with them especially in congregations that do not currently have them. Otherwise, please appoint another person to serve in this capacity. See attached Guidelines for Bishop’s Chaplain. It is entirely acceptable, and perhaps even helpful to assign a chaplain from the parish to be assigned to the bishop as well. You may certainly do this if you wish.

### **Order of Service**

Please send a fax or email copy of your Order of Service two weeks in advance to either, Bishop Nedi Rivera or Bishop Greg Rickel at fax number 206-325-4631 or [nrivera@ecww.org](mailto:nrivera@ecww.org) for Nedi or [grickel@ecww.org](mailto:grickel@ecww.org) for Greg. Please cc Tiffany Brannon, Executive Assistant to the Bishops, [tbrannon@ecww.org](mailto:tbrannon@ecww.org), on all correspondence.

Please advise the Bishop which lectionary will be used, and it is best to send the actual readings for the day as well.

### **Discretionary Fund Check**

Canon 15: Section 2 states, “Any loose offering of the people at such services shall be designated for the Bishop’s Discretionary Fund.” The Bishop’s Discretionary Fund is used for many benevolent purposes throughout the year and the support of the fund is crucial. Please make payable to Episcopal Diocese of Olympia; Note/memo: Bishop’s Discretionary Fund. Mail to: The Episcopal Diocese of Olympia, Attn: Tiffany Brannon, PO Box 12126, Seattle, WA 98102.

### **Confirmation Record Form**

If there are confirmations during the visitation please follow directions on the attached form.

### **Meeting with those to be Confirmed and Received**

The Bishops would very much like to meet with those to be Confirmed, Received, those reaffirming their faith for at least 15 minutes. This should be planned so that at least 15 minutes is available for preparation before the service.

At least two weeks before we arrive, or earlier, we would like to receive a letter from each person requesting baptism, confirmation, reception, or reaffirmation of vows. Please refer to the attached description for details of this letter. We have tried to make this attachment something you can give to each person.

### **Signing Prayer Books and certificates**

If you desire that the Bishop sign Prayer Books and certificates please have these ready and available before the service if at all possible or planned into the schedule for the remainder of the day.

### **Questions and additional information**

Please call the Bishop’s office at 206-325-4200 x 2010 and speak with Tiffany Brannon who will be happy to assist you.

## Bishops' Visitation Planning Form

Date of Visit:

Church:

Contact:(Please give phone and email)

Agenda for the Day: (Be as specific as possible, times, events, preside, preach, what you would like us to do)

Readings for the day: If possible send the entire set of readings you intend to use in the translation you choose to use.

Both Bishops have a GPS system however a contact number for that day would be helpful. Also, sending us the physical address on this form will be helpful.

Are there any issues, challenges, special recognitions, dedications, or celebrations for the day that we should know about?

If you have a special request for vestments for the day please let us know here as well. Be specific! Do you want rochet and chimere, or cope and miter?

If you do have confirmations, receptions, or reaffirmations please indicate how many of each in the space below and fill out the attached form for each person and return as soon as possible after the visitation.

### **Guidelines for Bishop Chaplain's**

The Bishop's goal is to have a deacon to serve with them at any visitation; however this may sometimes not be possible. When it is not, having a Bishop's Chaplain assigned will be even more crucial. Even with a deacon, it is a good practice to assign a person to act as the Bishop's Chaplain during her/his visit.

Assignment of a bishop's chaplain for the service is done as a courtesy to the bishop, in order to make it easy for the bishop to focus on the liturgy and the congregation, without having to worry about local variations in liturgical custom, and as an aid in juggling books, miter, crosier and pew sheets. Whether or not the chaplain carries the crosier in procession, the chaplain processes immediately before the bishop.

The Bishop and Rector/Vicar will outline the chaplain's duties and review the order of service in advance, so that the chaplain will be more confident in the assistance to be given to the bishop.

The chaplain may assist the Rector/Vicar and others in greeting the bishop upon arrival, taking the bishop's equipment to the sacristy or other room appointed, making certain that there are prayer book/hymnal at the bishop's seat, and providing whatever books/service leaflets are necessary for the entrance procession ready in (the sacristy).

In its most basic explanation, the Bishop's Chaplain becomes extra hands for the Bishop in accomplishing the various liturgical functions. We thank you for providing this very important assistance.

## Description and ideas for the letter to the Bishops

During bishop's visitations we quite often have the great honor and privilege of baptizing, confirming, receiving, and presiding over the reaffirmation of baptismal vows. As you will see in the visitation customary, we expect to have a meeting with all who will be participating in these sacramental acts. In most cases these meetings are quite brief and do not afford much chance for us to get to know the very interesting people you have spent so much time with and know so well. With that in mind, we are now requesting that each person that will present themselves to us upon our visitation write us a letter prior to our arrival. We would like to have this letter at least two weeks before the date of our visitation. The questions below are simply suggestions to stir up thought! If you think of some better ones, do let us know! Please send the letters directly to the bishop making the visitation at: The Diocese of Olympia, 1551 10<sup>th</sup> Ave E, Seattle, WA 98123.

Suggestions for the letter:

1. Tell us a bit about your spiritual journey, what brings you to this day?
2. Why the Episcopal Church?
3. What was one of the most interesting things you have learned during your preparation?
4. What is one thing that still concerns you, baffles you, makes you wonder about this tradition?
5. When we are with you, what is one question or issue you would like us to address in our brief time together.

As stated these are simply suggestions. Please write the letter as you would like but do write one. We would like to know more about you! And, we look forward to being with you. Congratulations on this very significant step on your spiritual journey.

Bishops Rickel and Rivera

# **LAY LICENSING**

## **DIOCESAN LICENSED MINISTRIES**

### **TRAINING**

Currently there are two Licensed Ministries for which there is diocesan training: Eucharistic Visitor and Worship Leader. Bishop Rickel has said that diocesan licenses require diocesan training, however, you may develop a local course, in conjunction with the Dean of the School, and approved by the Bishop. In addition, Diocesan guidelines for the local training of Eucharistic Ministers will be forthcoming. Until that time, it is expected that the clergy of the parish will prepare persons for the license of Eucharistic minister. Applicants for licensing must be confirmed communicants in good standing per the national canons.

Training for those seeking licenses as Pastoral Leaders and Catechists is in process of development. Courses in preaching for laypersons are available through the Diocesan School of Ministry and Theology, as are a variety of basic classes in scripture, theology, liturgy, and ethics.

Licensed ministries are not intended by the Episcopal Church's national canons to be static permissions. A continual growth in the knowledge and practice of the faith, even if only for one's own benefit, is assumed. Continuing Education is one of the requirements for the renewal of licensed ministries. Among other things, the Diocesan School offers courses that will help fulfill these requirements. For those unable to get to Seattle for the classes the Diocesan School offers there, provisions will be made in the near future for regional and online learning.

The Diocesan School of Ministry and Theology is responsible for doing the trainings and is happy to do so upon request. In most cases it makes sense to do the trainings with more than one parish participating or on a regional ministry basis with one parish responsible for hosting the event.

Applicants for licensing as Eucharistic Visitors must pass a background check. In the near future, as soon as it becomes available, training meant to safeguard the vulnerable elderly will also be required for this ministry.

In addition, the Bishop requires that Eucharistic Visitors will not go out alone, but in pairs. If there are not two, then there is no visit. This is similar to the requirement of two adults in every Sunday school classroom and for the same reason.

The host parish is responsible for providing room for the instruction; beverages and light snacks; and for making sure that the facility is opened before the training begins and

closed up afterward. The School will send out a letter of understanding detailing these things.

Registration of participants and payment for the training are due prior to the training. The registration should include the participants full name, address, phone number, email address, and the parish that is sponsoring them for training.

Parish clergy are also expected to take part in the morning session of the first day of training, offering reflections on both the Eucharist and on the Church's ministry to the suffering. This may be done by priests or deacons. Note that the oversight of Eucharistic Ministers and Eucharistic Visitors is commended to the care of the deacons in the parish. (Title III, Canon 4, Section 7).

The cost for Eucharistic Visitor training is \$350.00 and for Worship Leader Training \$450. The School pays the instructors, two for Eucharistic Visitor training and two for Worship Leader training. The School also reimburses its instructors for their mileage. There are some funds available in the School's budget to help with the cost if necessary. Training for Eucharistic Visitors is two days in length and for Worship Leader it is three days. The trainings normally take place on Saturdays with a week in between each session for the trainees to complete some homework assignments.

Eucharistic Visitor training includes training in pastoral boundaries and includes case studies dealing with issues that may arise during visits. There is also discussion of the place of a Eucharistic Visitor as part of the parish pastoral care team.

Worship Leader training is required for anyone who will be leading public worship. The curriculum teaches students how to intelligently put together the offices of Morning and Evening Prayer, the noonday office, the Service of Worship for the Evening, and Compline using the texts and music officially approved by the Episcopal Church. Consideration is also given to different circumstances: formal worship settings, various nursing home scenarios, as well as doing the offices at retreats.

A Rector/Vicar/Priest in Charge may request approval of a local course to meet the requirements above. This course will be built in consultation with the Dean of the School and approved by the Bishop.

The applicant for a license as a Worship Leader must pass a test administered by the priest of the parish, which is available by request from the School.

Applications for licenses should be addressed to:

Diocese of Olympia  
ATTN: Heather Kmita  
P.O. Box 12126  
Seattle, WA 98102

# PARISH ADMINISTRATION

## **Clergy Pension**

The Church Pension Group has a website for information regarding your benefits. You may choose to personalize your information and track your benefits on a regular basis. <http://www.CPG.org>

Information is provided on the website that will aid your treasurer in understanding the program. *The Clergy Pension Plan: What Every Treasurer Should Know* is available in PDF format at: [http://www.cpg.org/cms/content/404\\_institution.cfm](http://www.cpg.org/cms/content/404_institution.cfm)

## **Audits**

Every congregation and institution must have an annual audit. (Due September 1<sup>st</sup> for prior year), and NDI calculations (Net Disposable Income, due February 1st) are completed and submitted to the diocesan office

## **Parochial Report**

Each congregation is required annually to file a Parochial Report and a Net Disposable Income (NDI) Calculation. It is the responsibility of every Head of Congregation to insure that these reports are complete and filed on time. Parochial Reports (Due February 1<sup>st</sup>), Net Disposable Income, (due February 1st)

## **Discretionary Funds**

The administration of congregational discretionary funds must comply with national and diocesan canons.

**Authority:** The Alms and contributions, not otherwise specifically designated, at the Administration of the Holy Communion on one Sunday in each calendar month, and other offerings for the poor, shall be deposited with the Member of the Clergy in charge of the Parish or Mission or with such church officer as shall be appointed by him or her, to be applied by him or her or under his or her superintendence, to such pious and charitable uses as shall be fitting.

**Sources:** The sources of discretionary funds vary. The national canon referenced above is generally interpreted to mean that a minimum of one Sunday a month, the loose offering at the Holy Eucharist is first deposited with the parish treasurer and then set

aside for the rector's discretionary fund. In some parishes, the loose offering at all services of the Holy Eucharist on a designated day is set aside for the rector's discretionary fund. Some congregations have trusts, the income from which is designed for the discretionary fund. Some congregations set aside a budgeted amount for the discretionary funds of the clergy in addition to the traditional sources or as a substitute for them.

**Clergy:** Some clergy place gifts received for weddings, funerals and baptisms into the discretionary fund, and because of income tax considerations, it is recommended that clergy should either adopt the practice of putting all such fees and gifts into the discretionary fund or none.

It is improper to mingle personal funds of any kind with discretionary funds.

**Records:** Some congregations maintain the discretionary fund as a line item in the parish books, and the parish treasurer draws checks on vouchers signed by the clergy. This form of recordkeeping is the safest method of ensuring adequate records. When the clergyperson controls the checkbook of the discretionary fund, it is required that all contributions to the discretionary fund be made payable to the church, recorded in the books of the church, and then subsequently transferred by the treasurer to the discretionary fund.

Clergy who maintain their own checkbooks for discretionary funds are required to record the purpose of every check drawn on the account and the source of all deposits into it.

If a clergyperson receives a check payable to the church, with no other designation, the clergyperson is required to deposit it with the parish treasurer and receive vestry authorization before that money is deposited into the discretionary fund.

**Uses:** The traditional uses of the discretionary fund are to relieve the poor of the congregation and the larger community. Examples of appropriate discretionary spending for those in need include: rent, utilities, medical bills, etc.

The clergy may also use discretionary funds for expenses related to the exercise of ministry that are not covered in the budget, attendance at conferences, purchase of books and journals, and membership in groups that are related to the exercise of ministry.

However, items purchased from a discretionary fund are the property of the church, at least until such time as they may be given to the clergy as a gift by the vestry.

Clergy may employ a professional consultant with discretionary funds. When a clergy person provides meals or refreshments for groups of individuals directly related to the work of ministry and in the normal course of ministerial work, such expenses may legitimately be paid from discretionary funds. It should be noted that when such business expenses are paid from the discretionary fund, they are not subsequently allowable as income tax deductions by the member of the clergy.

When the discretionary fund is used to provide a gift to a particular individual, perhaps as a retirement gift to a parish secretary of long standing or a young person in need of scholarship assistance, such use is a legitimate function of the fund. Care should be taken to advise donors for such specific purposes that contributions whose sole intention is to benefit a named individual are not deductible contributions in terms of the donor's income tax returns.

Similarly, discretionary funds are not to be used to sustain the ongoing program of the church. There may be occasions, however, when the member of the clergy may wish to develop a program in mid-year where there is no budgeted money available or where the member of the clergy may wish to supplement some particular program through discretionary fund expenditures, but these should be exceptions to the general rule.

**Accountability:** Arrangement is to be made for someone to review this account, on a confidential basis, as part of the annual audit. Ideally, a trusted representative of the firm doing the audit should have a private conference with the priest. In other cases, it may be more practical for the senior warden or some other responsible member of the congregation, to serve in this role.

The clergyperson should keep a private record of exactly what is done with the proceeds of checks written. This is both a protection to the priest in case of an IRS audit and also a protection for the congregation, should a question arise as to the use of the funds.

The clergyperson should make regular reports to the vestry on general uses of the fund, maintaining the confidentiality of individual recipients.

**Income Tax:** Since the discretionary fund is to be used for the benefit of the church, it is not subject to income tax. When members of the clergy have improperly used discretionary funds for personal use, such use may be subject to income tax and may subject the member of the clergy to ecclesiastical, civil, and/or criminal liabilities.

- A. Discretionary funds should be maintained in bank accounts in the name of the congregation and carry the church's taxpayer identification number.
- B. An additional signatory, approved by the vestry, must be designated.
- C. Clergy are to be in compliance with Title I, Canon 7.
- D. Neither the funds nor items purchased from the funds are transferred to another cure with the rector, but remain with the congregation.

**Review:** At the beginning of a new ministry, the rector/vicar and the vestry/bishop's committee are urged to address the administration of the discretionary fund.

# HELPFUL ADDRESSES & LINKS

## **CHURCH PENSION GROUP**

445 Fifth Avenue  
New York, NY 10016  
Office: 800-223-6602  
FAX: 212-592-9400  
Website: [www.cpg.org](http://www.cpg.org)

Email: [mmarino@cpg.org](mailto:mmarino@cpg.org)

## **CHURCH INSURANCE CORP.**

Michael Marino  
The Church Ins. Co. of Vermont  
Office: 972-724-0108  
FAX: 972-724-3201

## **EPISCOPAL CHURCH CENTER & EPISCOPAL RELIEF AND DEVELOPMENT**

815 Second Avenue  
New York, NY 10017  
Office: 800-334-7626  
Website: [www.episcopalchurch.org](http://www.episcopalchurch.org)

*Add other addresses as needed*

## LINKS

### **Anglican Communion**

<http://www.anglicancommunion.org>

### **National Church Offices**

[http://www.dfms.org/index\\_flash.htm](http://www.dfms.org/index_flash.htm)

### **Episcopal Diocese of Olympia**

<http://www.ecww.org>

### *Constitution and Canons*

*of the Episcopal Church of the United States, 2006*

[http://www.churchpublishing.org/general\\_convention/index.cfm?fuseaction=candc](http://www.churchpublishing.org/general_convention/index.cfm?fuseaction=candc)

### **Clergy Deployment Office (CDO)**

<http://arc.episcopalchurch.org/cdo>