



Episcopal Diocese of Oregon

Policies and Procedures Manual

Preface

This manual is intended to serve as a resource to all congregations in the Diocese of Oregon. Its contents combine guidelines, procedures, best practices and Diocesan policies, all offered to congregations as helpful sources of information on a wide range of church matters.

One goal of this manual is to maintain a level of administrative consistency in congregational practices across the Diocese. It is also recognized that congregations have unique needs and cultures. When an individual congregation experiences a specific need different from or unaddressed in this manual, a draft of the intended procedure or guideline should be forwarded to the Diocesan Council for review. Diocesan Council then has the option of forwarding the proposed procedure or guideline for possible inclusion in this manual. In this manner operational best practices can be communicated across the Diocese.

Table of Contents

Diocesan Mission Statement	Mission:I	6.5 Continuing Education and Conferences	Sec-6:25
Four Marks of Vital Congregations	Mission:V	6.6 Leave Time	Sec-6:26
1.0 – Structural Overview	Sec-1:1	6.7 Work Week, Overtime, Time Records, Breaks, Lunch Period	Sec-6:27
1.1 Episcopal Church	Sec-1:1	6.8 Employee Reviews.	Sec-6:27
1.2 Provinces	Sec-1:1	6.9 Voluntary Termination	Sec-6:27
1.3 Diocese Of Oregon	Sec-1:1		
2.0 – Diocesan Organization	Sec-2:2	7.0 – Administration	Sec-7:28
2.1 Convention	Sec-2:2	7.1 Property Ownership And Improvements	Sec-7:28
2.2 Standing Committee	Sec-2:2	7.2 Insurance And The Use Of Buildings And Facilities	Sec-7:29
2.3 Board Of Trustees	Sec-2:3	7.3 Capital Improvements	Sec-7:29
2.4 Diocesan Council	Sec-2:3	7.4 Program and Budget –the Diocese and the Congregations	Sec-7:30
2.5 Convocations	Sec-2:3	7.5 Diocesan Program Assessment (DPA)	Sec-7:30
2.6 Mission Congregations	Sec-2:3	7.6 Finances and Planned Giving	Sec-7:31
2.7 Parish Congregations	Sec-2:4	7.7 Registers, Records and Reports	Sec-7:32
3.0 – Ministry And Governance	Sec-3:5	7.8 Diocesan Reports	Sec-7:32
3.1 Lay Ministers	Sec-3:6	7.9 Annual Meetings	Sec-7:33
3.2 Ordained Ministers	Sec-3:6	8.0 Appendices	A&F-34
3.3 Internet Use Guidelines	Sec-3:7	8.1 Diocesan Commissions, Committees, and Ministries	A&F-35
3.4 Anti-Racism (Diverse Church) Training	Sec-3:8	8.2 Reference Bylaws, Canons, And Forms	A&F-36
3.5 Safe Church Training	Sec-3:8	8.3 Personnel Employment and Compensation	A&F-39
3.6 Background Checks for Lay Employees and Volunteers	Sec-3:9	8.4 Discretionary Funds and Expense Accounts	Appendix69
3.7 Governance of Each Congregation.	Sec-3:9	8.5 Church Polity and History	Appendix70
3.8 Governance of Convocations	Sec-3:10		
3.9 Governance of the Diocese	Sec-3:10		
4.0 – Related To the Episcopate	Sec-4:11		
4.1 Customary for the Bishop’s Visitations	Sec-4:11		
4.2 Preparation for Ordination	Sec-4:12		
4.3 Licensed Ministers	Sec-4:12		
4.4 Marriage Consent for Divorced Persons	Sec-4:12		
5.0 – Personnel Practices for Clergy	Sec-5:13		
Preface.	Sec-5:13		
5.1 Vacancies: Rector or Vicar or Deacon	Sec-5:14		
5.2 Compensation And Benefits	Sec-5:17		
5.3 Clergy Wellness	Sec-5:18		
5.4 Pastoral Care & Spiritual Direction	Sec-5:20		
5.5 Mutual Ministry Review.	Sec-5:20		
5.6 Clergy Retirement	Sec-5:21		
6.0 – Lay Personnel Policy	Sec-6:23		
6.1 Introduction	Sec-6:24		
6.2 Staffing	Sec-6:24		
6.3 Compensation	Sec-6:25		
6.4 Benefits	Sec-6:25		

Diocesan Mission Statement

Proclaiming God's realm while living Gospel lives

Diocesan Core Values

- We live out our mission and vision as a Christian community guided by these core values:
- Centering our lives in the Baptismal Covenant
- Living in and sharing God's abundance in thankfulness for the riches we have
- Practicing resurrection: living in the open expectation of the new thing God is doing at all times and in all places
- Responding compassionately to those in need
- Nurturing children and youth in faith, hope, and love
- Caring for, protecting, and defending all of God's creation
- Seeking and inviting the unique gifts of all our members
- Listening deeply, speaking honestly and with respect
- Mediating our disagreements, misunderstandings, and concerns through reconciliation and forgiveness
- Continuing to increase our knowledge of and commitment to what it means to live in God's realm
- Support Episcopal Relief & Development

Diocesan Vision Statement

Gathered in the love of God in Christ and accepting of diversity, the Diocese of Oregon actively nourishes renewal and growth, cares for creation, and values the unique gifts of all as we encourage innovation to meet the needs of the 21st century church. We ground our lives in Anglican worship while connecting ourselves to the wider church and world.

Strategic Directions

Our mission and vision statements speak broadly and compellingly about our identity as a community, an identity that is informed by a prayerful reading of Holy Scripture and the Book of Common Prayer. However, that identity only becomes visible to us and others as it is clarified through specific and strategic directions that inform our work together.

Our strategic directions:

- Strengthen and Support Congregational Life
- Strengthen and Support Diocesan Capacity For Mission
- Strengthen and Support Missional Leadership
- Strengthen, Support, and Advocate for Gospel Justice

Congregational Life

"Then Jesus called the twelve together and gave them power and authority over all demons and to cure diseases, and he sent them out to proclaim the Realm of God and to heal." –Luke 9:1-2

Strengthen and support congregational life: We strengthen congregational life to nourish the unique gifts of witness found in communities throughout the diocese. To accomplish this we will:

1. Create a diocesan learning environment so that the best practices of Christian community become everyday actions.
 - a. Review and further develop existing programs for
 - Children's Christian formation (a Children's Charter for the church)
 - Adult Christian formation (Charter for Lifelong Christian Formation)
 - Youth and young adult Christian formation (charter for Lifelong Christian Formation)
 - Liturgy and preaching
 - Communication, media, and internet presence
 - Stewardship and finance
 - Social ministries and social justice witness
 - Pastoral care and healing ministries
 - Hospitality and evangelism
 - Healthy congregational life
 - Camping and retreat ministries
 - Latino ministries
 - b. Develop the Academy for Formation and Mission to nourish intentional, ongoing, and holistic

discernment, formation, and capacity for ministry in all orders

- Broad lay ministry educational
 - Full education for the diaconate
 - Initial educational program for priests
2. Prioritize diocesan resources to serve the needs of congregations.
 - a. Increase diocesan staff consultations
 - b. Conduct yearly mission and ministry reviews with all congregations and clergy
 - c. Create and train parish consultants to facilitate strategic mission planning
 - d. Further develop diocesan camping experience
 - e. Implement regional and shared initiatives to enlarge the scope of youth and young adult ministries
 3. Develop parish partnerships to enrich our knowledge base and deepen our relationships.
 - a. Identify and mentor effective lay and clergy leaders
 - b. Identify and link congregations addressing common challenges
 - c. Develop convocation life with links to the cathedral and central regional churches
 4. Facilitate transition processes in congregations to strengthen parish ministry
 - a. Intentional interim placement
 - b. Improve profile development
 - c. Develop a variety of options for parish search processes

Diocesan Mission

"But if it is by the spirit of God that I cast out demons, then the Realm of God has come to you." –Matthew 12:28

Strengthen and support diocesan capacity for mission: We implement and effect organizational structures to allow time and energy to be directed to the work of ministry. To accomplish this we will:

1. Implement effective and creative management structures to clarify roles, streamline operations, and use resources wisely.
 - a. Create job descriptions for diocesan staff
 - b. Create model job descriptions for congregations
 - c. Improve diocesan and congregational recordkeeping
 - d. Reduce diocesan and congregational clutter
 - e. Complete revision of Policies and Procedures manual
 - f. Revise Canons to reflect current practice
 - g. Review and update diocesan and congregational structures on an ongoing basis
2. Streamline financial management in order to use resources wisely.
 - a. Create new diocesan financial job structure
 - b. Evaluate costs and reduce waste in system
 - c. Evaluate the costs, benefits, and liability of using The Bishop's Close as diocesan offices
 - d. Reviewing Corporate Sole and restructure if appropriate
 - e. Explore new business plan/ways of organizing and financing for ministry in the 21st century
3. Promote ministries to diverse communities and underserved populations to deepen these relationships and learn more fully who God is calling us to be.
 - a. Identify and utilize learning from current mission restarts
 - b. Plan intentional and ongoing engagement in emerging Christianity conversation
 - c. Support and review Community Missions Project
 - d. Empower strong leadership in diverse communities
 - e. Encourage and support ministries with Latino, Native American, African American, Asian, and other underserved communities

Leadership Development

"Then the King will say to those on his right hand, come, you that are blessed by my father, inherit the Realm prepared for you from the foundation of the World." –Matthew 25:34

Develop missional leadership: We develop strong leaders to nourish unique gifts that increase our capacity to proclaim the Realm and live Gospel lives. To accomplish this we will:

1. Celebrate the gifts of our lay and ordained leaders, strengthening them for mission and identifying effective models of discipleship.
 - a. Institute diocesan leadership awards
 - b. Mentor identified leaders
 - c. Celebrate successes in creatively meeting challenges
2. Develop new leadership to further our ability to be effective God's mission.
 - a. Start new program on discernment
 - b. Provide financial and institutional support for leadership development
 - c. Establish term limits in volunteer diocesan positions
 - d. Raise up more deacons diocesan-wide

Gospel Justice

"... and what does the Lord require of you but to do justice, and to love kindness, and to walk humbly with your God?" –Micah 6:8

Strengthen, support, and advocate for Gospel justice: We respond to God's call to serve all God's people and act on behalf of those in need. We build bridges of love and respect that deepen our relationships and strengthen our communities. To accomplish this we will:

1. Rebuild global mission to enrich our experience of God's presence everywhere.
 - a. Establish a new diocesan companion relationship
 - b. Encourage and assist various congregational global engagements especially in smaller congregations
 - c. Support Episcopal Relief & Development
2. Encourage and develop local mission work throughout the diocese to live out our identity as faithful witnesses to God's love.
 - a. Celebrate current local mission work
 - b. Promote the new Sustainable Development Goals
 - c. Engage all diocesan levels in local mission ventures
3. Work to end racism that God's justice may be visible in the world.
 - a. Implement new and innovative strategies that identify and resolve classic historical, persuasive, persistent, and problematic inequalities among all people
 - b. Examine diocesan hiring practices and revise to reflect best practices
 - c. Seek qualified candidates from underrepresented racial and ethnic communities for diocesan and congregational positions
 - d. Encourage the raising up of vocations within local ministry populations
4. Partner with ecumenical brothers and sisters to build up the Church's witness to the world.
 - a. Bishop continues work with Ecumenical Ministries of Oregon
 - b. Seek out and highlight Lutheran-Episcopal parish connections
 - c. Continuing conversation with all faith communities
 - d. Build on current joint ministries
 - e. Explore possibilities for working with other faith communities in service
5. Seek positive media exposure to provide information to the larger community about who Episcopalians are and our concerns as Christians in the public arena.
 - a. Bishop, Canon Theologian, and others will speak out on community matters
 - b. Bishop, Canon Theologian, and others will speak out on national matters
 - c. Bishop, Canon Theologian, and others will speak out on global matters

Four Marks of Vital Congregations

Joyful Leadership: A vital congregation has lay and ordained leaders who are committed, motivated, and joy-filled
Leaders courageously call people into deeper commitment to the Risen Christ
Laypeople and clergy try new things and take risks, helping each other discern where the Spirit is calling them as a community
Lay and ordained leaders nurture each other, creating a learning culture that supports the good work of the congregation
Leaders share power in ways that involve many people, with clear lines of responsibility

Again I will say, rejoice.

Philippians 4:4

Sacramental Hospitality: A vital congregation practices sacramental hospitality by directly connecting our worship of Christ as gathered community with serving Christ in the wider world.
Preaching gives examples and encouragement for an ever-deeper connection between worship and daily life
Intercessions during the Sunday liturgy and actions during the week reflect a dynamic connection with the concerns of the world
Small group bible study deepens participants' connection to the Gospel
The same attention and concern is given to outreach as to worship

For as often as you eat this bread and drink the cup, you proclaim the Lord's death until he comes.

1 Corinthians 11:26

Mission in the World: A vital congregation is known beyond its own membership as having a particular mission or gift.
Church members collaborate with people within the congregation and the wider community through service, crossing traditional boundaries of age, class, race, and language.
The congregation makes building and grounds available to wider community uses
The congregation intentionally embraces its strengths, engaging strengths and resources in service to Christ, rather than hiding them under a bushel or safeguarding them for congregation members alone.

You shall be called the repairer of the breach, the restorer of streets to live in.

Isaiah 58:12

Formation in Christ: A vital congregation creates community that leads its members to grow spiritually by becoming more Christ-like
Individual members can identify a clear or growing sense of mission in their daily lives.
Respect for diverse gifts is evidenced by the offering a variety of growth opportunities for people of all ages and stages of life
Both lay and clergy actively assist in identifying gifts and providing opportunities to use gifts
Every ministry group exists not for itself but for the wider mission of the church. Ministry groups are periodically evaluated against the wider mission.

So if anyone is in Christ, there is a new creation.

2 Corinthians 5:17

1.0 – Structural Overview

1.1 The Episcopal Church

1.2 Provinces

1.3 The Diocese of Oregon

1.1 Episcopal Church

The Episcopal Church traces its origin to Christ and the Apostles in the 2nd century and, in its modern form, to the English Reformation of the 16th century and the Church of England, and to post-revolutionary America, when the Church was first constituted as an independent church in communion with Canterbury.

1.2 Provinces

The Anglican Communion has maintained the Episcopal form of government. Each national Anglican “province” of the Communion worships in the Common Prayer tradition, locally adapted. The Episcopal Church, USA, is the American Province of the world wide Anglican Communion.

The Episcopal Church in the United States uses the term “province” within our national church to describe its nine subdivisions and its affiliated dioceses beyond the United States. The Episcopal Diocese of Oregon is in Province VIII, the Province of the Pacific.

1.3 Diocese Of Oregon

The Diocese of Oregon is the corporate entity of the Episcopal Church encompassing western Oregon from the Columbia River on the north to the California border on the south, and from the Cascade crest on the east to the Pacific Ocean on the west.

Under the administration of the Bishop, the Diocese is made up of 71 congregations (including Trinity Cathedral and ten Latino congregations).

In June, 2011, Diocesan Convention adopted the current mission and vision statement for the Diocese, along with core values and four strategic directions to guide our Diocese. Please refer to the frontispiece of this Manual for these statements.

2.0 – Diocesan Organization

2.1 Convention

2.1.1 Clergy Participation

2.1.2 Lay Representation

2.2 Standing Committee

2.3 Board Of Trustees

2.4 Diocesan Council

2.5 Convocations

2.6 Mission Congregations

2.7 Parish Congregations

2.1 Convention

The Convention of the Diocese meets annually and is vested with the responsibility and authority to establish the programs necessary to carry out the stated purpose of the Diocese, to adopt budgets to fund the programs and to enact such legislation as may be required to conduct diocesan affairs. Each congregation in union with the Convention is represented by its clergy and lay delegates.

2.1.1 Clergy Participation

According to the Diocesan Constitution, clergy who are canonically and actually resident in the Diocese and are actively engaged in ministry in this Diocese have seat, voice and vote in the Convention. A member of the Clergy, licensed by the Bishop, who has charge of a Parish or Mission in the Diocese when Convention convenes shall also be entitled to a seat and vote. (See Article 4 of the Constitution of the Diocese of Oregon.)

2.1.2 Lay Representation

Lay representation (including seat, voice and vote) is set according to the Diocesan Constitution as follows:

Pledging Units	Delegates
0 – 50	2
51 – 100	3
101 – 200	4
201 – 300	5
301 – 400	6
401 – 500	7
501 +	8

(See Article 4 of the Constitution of the Diocese of Oregon.)

2.2 Standing Committee

Members of the Standing Committee (4 clergy and 4 lay persons) are elected by the Diocesan Convention for three-year terms. The duties of the committee are set forth by national canons and include ratification of Episcopal elections, serving as the Ecclesiastical Authority of a diocese in the event there is no bishop in this role, consenting to the enrollment of candidates for holy orders and to ordinations, and serving as Council of Advice to the Bishop.

The Standing Committee or Convention or the Bishop must give consent when a congregation or Diocesan Institution takes action that encumbers or alienates property. (See Canon 3.2.6e of the Canons of the Diocese of Oregon.)

2.3 Board Of Trustees

The Board of Trustees of the Diocesan Corporation is composed of the Bishop, the Chancellor, the Secretary of the Diocese, the Treasurer of the Diocese, and three clergy and three lay persons elected by Diocesan Convention for three-year terms. It holds in trust any and all properties of the Diocese and mission congregations, gifts, and bequests, other than those held by parochial or other duly organized corporations of the Diocese.

2.4 Diocesan Council

The Diocesan Council, with the Bishop as chair, has oversight of the missionary, educational, and social programs of the Diocese as determined by the Convention, and implemented through departments, commissions, and committees (See Appendix 8.1 for list), and by the Bishop and the Bishop's staff. Members of the Diocesan Council are elected by the Convention (six clergy and six lay persons for three-year terms), and by the Convocations (seven clergy and seven lay persons for one-year terms). Those selected by the Convocations are confirmed by the Convention.

The Diocesan Council is responsible for setting diocesan goals, developing programs, and preparing a proposed budget to fund those programs and all other expenses of the Diocese.

2.5 Convocations

The Convocations are the seven regional subdivisions of the Diocese, created to facilitate close communication among local congregations and support effective regional ministry. The Convocations are Central, Columbia, Metro East, South Coast, Southern, Sunset, and Willamette. Each congregation is a member of the Convocation in which it is located and is represented by its clergy and elected representatives to Convocation. These selected representatives to Convocation are the same persons as are elected to serve as delegates to Diocesan Convention and are elected for one-year terms.

The Dean of each Convocation is a member of the clergy appointed annually by the Bishop at Convention. The President of each Convocation is a lay person who is elected annually at the Convocation meeting in March.

Convocations meet several times during the year and must meet no later than 30 days before Diocesan Convention to consider proposed program and budget, and to select one clergy and one lay person to represent the Convocation on the Diocesan Council. (The selection of these persons is confirmed by the Convention.)

Convocations have the authority and responsibility to participate in the development of the Diocesan Program and Budget for the coming year by considering and evaluating program and budget priorities in the spring and by considering and evaluating the proposed budget previously approved by Diocesan Council in the fall. (See Section 7.4 for a description of this process.)

2.6 Mission Congregations

A mission congregation is an unincorporated unit within the Diocese which exists as an extension of the missionary work of the Diocese in accordance with the Constitution, Canons, Doctrine, Discipline, and Worship of the Episcopal Church, and in accordance with the Constitution and Canons of the Diocese of Oregon.

The Bishop's Advisory Committee (BAC) is the mission congregation's counterpart to the vestry of a parish. The BAC manages the temporal affairs of the congregation subject to limitations of civil and canon law. The BAC is responsible for advising the Bishop and the vicar in setting goals, developing programs, developing and overseeing budget and finances, and maintaining the buildings and properties of the congregation.

The Bishop is the rector of all mission congregations. He may appoint the vicar, who in turn is the presiding officer and a member of the BAC. However, the general practice of this Diocese is for the mission congregations to follow the diocesan search process when seeking Vicars. (See Section 5.1).

The Senior Warden, Junior Warden, and the other elected persons are the other members of the BAC. The BAC is authorized to fill any vacancies which may occur during the year. (See Section 3.3 for further information.)

The number of BAC members shall not be less than five (5) nor more than twelve (12). Any mission may avail itself of the provisions for parishes in Canon 6.7 which describes the alternatives for election of parish vestries. (See Appendix 8.2.2 and the Canons of the Diocese of Oregon.)

To be eligible for election, BAC candidates must be lay persons, 18 years of age or older, who are qualified to vote at the Annual Meeting. A majority of the BAC must be confirmed communicants in good standing. The Diocese strongly recommends that candidates make a commitment to

- Attend all meetings of the BAC and notify the wardens if unable to attend

- Attend Church Leaders Workshops offered periodically by the Diocese
- Make at least one call on a member of the congregation each month.

The BAC elects the delegates to Diocesan Convention and certifies them to the Secretary of the Convention within 30 days of their election. These delegates also serve as representatives of the congregation to the Convocation in which the congregation is located.

2.7 Parish Congregations

A parish congregation is a corporate unit within the Diocesan which exists in accordance with the Constitution, Canons, Doctrine, Discipline, and Worship of the Episcopal Church, and in accordance with the Constitution and Canons of the Diocese of Oregon.

A parish is self-supporting and has the right to elect its rector after consultation with the Bishop. The rector is president of the parish corporation and presiding officer of the Vestry.

The Vestry (or chapter of the Cathedral) is the board of directors of the parish corporation, responsible for the management of the temporal affairs of the congregation, subject to limitations of civil and canon law.

Each parish is managed in accordance with its bylaws which establish procedures and practices for electing members of the Vestry, conducting the Annual Meeting, and attending to the general business affairs of the parish. (See Appendix 8.2.1 for further information on bylaws.)

3.0 – Ministry And Governance

3.1 Lay Ministers

3.2 Ordained Ministers

3.3 Internet Use Guidelines

3.4 Anti-Racism (Diverse Church) Training

3.5 Safe Church Training

3.6 Background Checks for Lay Employees and Volunteers

3.7 Governance of Each Congregation

3.7.1. Leadership of the congregation is provided by officers described as follows:

3.7.2. Congregations in Arrears in Diocesan Program Assessment

3.8 Governance of Convocations

3.9 Governance of the Diocese

Now there are varieties of gifts, but the same Spirit, and there are varieties of services, but the same Lord; and there are varieties of activities, but it is the same God who activates all of them in everyone. To each is given the manifestation of the Spirit for the common good. To one is given through the Spirit the utterance of wisdom, and to another the utterance of knowledge according to the same Spirit, to another gifts of healing by the one Spirit, to another the working of miracles, to another prophecy, to another the discernment of spirits, to another various kinds of tongues, to another the interpretation of tongues. All these activated by one and the same Spirit, who allots to each one individually just as the Spirit chooses.

For just as the body is one and has many members, and all the members of the body, though many, are one body, so it is with Christ. For in the one Spirit we were all baptized into one body - Jews or Greeks, slaves or free - and we were all made to drink of one Spirit.

[1 Corinthians 12:4-13]

The ministers of the Church are lay persons, bishops, priests, and deacons. [BCP, p. 855].

3.1 Lay Ministers

“The ministry of lay persons is to represent Christ and his Church; to bear witness to him wherever they may be; and, according to the gifts given them, to carry on Christ’s work of reconciliation in the world; and to take their place in the life, worship, and governance of the Church” [BCP p. 855]

All baptized persons are called to ministry as a part of the Body of Christ. Christians engage in this ministry where they work and live, within and beyond the local congregation. (See also Title III of the Episcopal Church Canons, and the Licensed Ministries Manual published by the Diocesan Commission on Ministry.) These ministries support the church’s life of worship and fellowship and require licensing but not ordination.

Pastoral Leader: A lay person licensed to exercise pastoral or administrative responsibility in a congregation under special circumstances.

Worship Leader: A lay person who regularly leads public worship under the direction of the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith.

Lay Preacher: A lay person licensed to preach.

Eucharistic Minister: A lay person authorized to administer the Consecrated Elements at a Celebration of Holy Eucharist.

Eucharistic Visitor: A lay person authorized to take the Consecrated Elements in a timely manner following a Celebration of Holy Eucharist to members of the congregation who, by reason of illness or infirmity, are unable to be present at the Celebration.

Catechist: A person licensed to prepare persons for baptism, confirmation, reception, and the reaffirmation of baptismal vows.

3.2 Ordained Ministers

Ordained ministers are those persons who have been called by God to minister pastoral care, preach the Gospel, and administer the sacraments. They have received theological and other particular education, training, and examination and have been ordained by the Church. (The process to prepare for Holy Orders is outlined in Section 4.2.) The ordained ministry of bishops, priests and deacons differ in the following ways:

Bishops

“The ministry of a bishop is to represent Christ and his Church, particularly as apostle, chief priest, and pastor of a diocese; to guard the faith, unity, and discipline of the whole Church; to proclaim the Word of God; to act in Christ’s name for the reconciliation of the world and the building up of the Church; and to ordain others to continue Christ’s ministry.” [BCP p. 855]

A Diocesan Bishop is the chief pastor of the Diocese who acts as president of the Diocesan Corporation, presiding over the Diocesan Convention and Diocesan Council.

A Bishop Coadjutor, when elected, assists the Diocesan Bishop, assumes such duties as are assigned and automatically succeeds to the post at the death or retirement of the Diocesan.

A Suffragan Bishop, if there is one, serves at the pleasure of the Diocesan Bishop and assumes such duties as are assigned, but does not have the right of succession upon death or retirement of the Diocesan Bishop.

Priests

“The ministry of a priest is to represent Christ and his Church, particularly as pastor to the people; to share with the bishop in the overseeing of the Church; to proclaim the Gospel; to administer the sacraments; and to bless and declare pardon in the name of God.” [BCP p. 856]

A priest’s pastoral and sacramental responsibilities are set forth in the Ordinal of the Book of Common Prayer, p. 531. Priests are called by parishes (with the concurrence of the Bishop) or are appointed to Mission Congregations and other positions by the Bishop. Priests also have the responsibility of “taking part in the councils of the church” and are generally expected to spend a portion of their time in the work of the church beyond the local congregation. (See Section 8.3.1 and Section 8.3.2 for sample Covenants of Ministry for priests.)

Deacons

“The ministry of a deacon is to represent Christ and his Church, particularly as a servant of those in need; and to assist bishops and priests in the proclamation of the Gospel and the administration of the sacraments.” [BCP p. 856]

A deacon's pastoral and sacramental responsibilities are set forth in the Ordinal of the Book of Common Prayer. [BCP p. 543] Deacons are assigned by the Bishop. When assigned to a congregation, a deacon works under the direction of the rector or vicar.

Often, a deacon will be engaged in work beyond the usual boundaries of parish life, "bringing the hopes, needs, and concerns of the world to the church." (See Section 8.3.3a and 8.3.3b for sample Covenant of Ministry.) They may also be engaged in providing services originating with the Diocese.

3.3 Internet Use Guidelines

Electronic communications enhance the exchange of information, but also raise questions concerning responsibility and privacy. E-mail is fast and convenient and, when properly used, supports the business and pastoral activities of the church. While most Internet use serves legitimate business and professional purposes, the potential for abuse exist. Such abuse infringes on staff productivity and may also create legal risks and liabilities. (For more details see the Social Media Guidelines Handbook on our Diocesan website.)

Do not send messages that you would not be willing for everyone to read.

Internet Protocol in a Congregational Setting:

E-mail is a service provided to parish staff to assist them in the performance of their duties.

Internet searches should be job-related and support business or professional activities. Staff shall not "browse the web" on church time, create personal web pages, or otherwise use church facilities to access the Internet for any inappropriate or illegal activity, or for reasons unrelated to church business and staff job responsibilities, except as noted under Personal Use.

Communications should be job-related, to the point and professional intone.

All must exercise sound judgment and common sense when distributing e-mail messages.

All must ensure that the correct e-mail address is used for the intended recipient(s).

All communications and information transmitted, received, or stored in parish computer systems belong to the church and may be monitored. Staff should have no expectation of privacy.

E-Mail Etiquette

Include signature footer at the bottom of the message with name, affiliation and e-mail address. Include disclaimer* at bottom of e-mail message.

Remember, e-mail is neither secure nor private. Do not treat e-mail as confidential.

***Disclaimer:**

This message is intended for the sole use of the individual and entity to which it is addressed and may contain information that is privileged, confidential and exempt from disclosure under applicable. If you are not the intended addressee, nor authorized to receive for the intended addressee, you are hereby notified that you may not use, copy, disclose or distribute to anyone the message or any information contained in the message. If you have received this message in error, please immediately advise the sender by reply e-mail and delete the message. Thank you very much.

Personal Use:

Personal use will be allowed on an occasional and limited basis subject to these criteria:

- Use is brief and occurs infrequently.
- Use does not interfere with the performance of official duties.
- Use does not interfere with or disrupt the work of others.
- Use does not compromise the security or integrity of the church computer systems.
- Use does not violate any provision of church e-mail and Internet policy.

3.4 Anti-Racism (Diverse Church) Training

In keeping with the spirit of the resolutions passed by General Convention which require the leadership of The Episcopal Church to take anti-racism training, the Diocese of Oregon's Commission to End Rac-ism oversees the program called Diverse Church. It is based on the work of The Rev. Eric Law of the Ka-leidoscope Institute in the Diocese of Los Angeles.

Our goals:

- To make ourselves and others aware of the divisiveness sin of racism and other "isms".
- To give us skills to confront racism and other "isms" in ourselves and in our institutions.
- To transform ourselves and the people around us to become a more open and just community based on love and mutual respect for one another.

Diverse Church training is required for the following people in the Diocese of Oregon::

- Active clergy and postulants
- Diocesan staff
- Convocation presidents
- General Convention deputies
- Members of the Standing Committee, Diocesan Council, Commission on Ministry, and the Board of Trustees

Leaders of local congregations who are interested in multi-cultural ministry are encouraged to take the training as well. This training must be renewed every 10 years. Online registration is available on the di-ocesan website.

3.5 Safe Church Training

SAFE Church trainings provide awareness in the areas of sexual conduct and sexual abuse and are re-quired for all clergy, lay employees and volunteers within the congregations and organizations of the Diocese of Oregon. The Diocese of Oregon offers two separate trainings using materials developed by the Church Pension Group. The following people are required to take the various trainings:

Safeguarding God's Children

- All members of the clergy whether stipendiary or non-stipendiary
- All interns and persons in the ordination process
- All paid employees
- All wardens and vestry/BAC members
- All volunteers (age 16 and over) who work with children and youth. Volunteers age 12-14 are welcome to attend if accompanied by a parent. We do not recommend this training for children under the age of 12.

Safeguarding God's People: Preventing Sexual Exploitation and Sexual Harassment

- All members of the clergy whether stipendiary or non-stipendiary
- All interns and persons in the ordination process
- All paid employees and unpaid staff members
- All unpaid lay leadership (wardens, vestry/BAC members, members of other boards)
- All others who volunteer themselves for church-related service
- The following ministers licensed under Canon III.4: Pastoral Leaders, Worship Leaders, Preachers, Eucharistic visitors, and Catechists
- Other persons who have pastoral relationships (Stephen ministers, spiritual directors, counselors, peer mentors, life coaches, etc.)

All participants in face-to-face trainings will be required to sign in at the beginning of each session and sign out at the end. Participants who complete all four hours will receive a certificate. A copy of their certificate will be sent to their local church. Copies of all certificates will be kept at the diocesan office. Effective January 1, 2018 training must be renewed every five (5) years. Renewals may be completed by either 1.) face-to-face training sessions or 2.) Safeguarding Online provided by Praesidium.

All clergy licensed or canonically resident in the Diocese of Oregon are required to have this certification in their file in the Bishop's Office. Lay employees and volunteers must also have this training and their certification must be kept by the congregation with which they are affiliated. Certifications from other dioceses and denominations which are based on the materials developed by Praesidium for the Church Pension Group (such as the Roman Catholic Archdiocese of Oregon) may be used to fulfill this requirement. No other training programs are accepted. 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.

Additional information regarding Sexual Misconduct and Sexual Abuse Policies can be found on [the Safe Church page](#) of diocesan website.

3.6 Background Checks for Lay Employees and Volunteers

The Diocese of Oregon requires background checks of the following lay employees and volunteers:

- All lay paid staff
- All volunteers who work with children and youth
- Volunteers who have pastoral relationships such as spiritual directors, Stephen ministers, and Lay Eucharistic Visitors
- Church treasurers

Background checks will be handled at the diocesan level. We have set up an account with Praesidium which is the group that is recommended by the Church Pension Fund. We will be using Praesidium's Confidence Package which includes the following:

- Multi-state criminal background check
- National sex offender registry check
- Alias search
- Social Security number verification

Each congregation should have a designated Local Background Check Administrator. This person keeps track of members of the congregation who are required to have a background check, contacts them by email to let them know how to begin the process, and maintains the congregation's listing of those who have successfully completed the background check requirement.

Any reports with discrepancies will come back to the diocesan office where they will be screened using the same criteria the State of Oregon uses to screen foster families. If the background check meets the diocesan criteria, the person and the congregation will be notified that the background check has been completed. If the background check indicates a potential issue, the applicant will be notified under the terms of the Fair Credit Reporting Act (FCRA). Final decisions about a person's ability to serve will be made by the Bishop and Canon to the Ordinary in consultation with local clergy.

3.7 Governance of Each Congregation

The governance of each congregation is prescribed by its bylaws and the canons of the church. (See Section 8.2.1 for bibliography of examples.)

The Annual Meeting of the congregation shall be upon a day and at an hour as determined by the Vestry or BAC. It shall elect its governing body (Vestry in a parish, Chapter at the Cathedral, or BAC in a mission), and hear the reports of the priest in charge, wardens, committees and other church groups. The Vestry, Chapter or BAC shall attend to the fiscal matters of the congregation between Annual Meetings. (See Section 7.9 for further information about Annual Meetings.)

3.7.1. Leadership of the congregation is provided by officers described as follows:

The Presiding Officer at meetings of a parish congregation or its governing body (the Vestry) is the rector and of a mission congregation or its governing body (BAC) is the vicar. The senior warden presides in the absence of the rector or vicar.

The Senior and Junior Wardens of a parish or mission must be confirmed communicants in good standing in the Church. They are selected and hold office by either of two methods determined by vote of the congregation.

Note: Methods are similar for parish or mission wardens and are referenced in detail in Section 8.2.2. Additional duties of the wardens are normally listed in the congregation bylaws.

The Clerk of the Vestry or BAC records the minutes of that body and of the Annual Meeting of the congregation. The clerk certifies the Parochial Report and files the articles of incorporation of a parish. The clerk may have other duties prescribed by the congregation bylaws, or by the action of the Vestry or BAC.

The Treasurer of a congregation maintains records of account for all funds received and disbursed, and presents them annually for audit. Each month the treasurer sends the Diocese its Diocesan Program Assessment payment, in compliance with Diocesan Canon 5.2. The treasurer also maintains records and assists the rector or vicar in the preparation of the annual Parochial Report.

3.7.2. Congregations in Arrears in Diocesan Program Assessment

The November 2009 Diocesan Convention recognized that from time to time there are parishes unable to meet their financial obligations to the Diocese and to their clergy in the ministry of proclaiming the Gospel of Jesus Christ. Diocesan Canon 5.2.4, On Delinquency in Diocesan Program Assessment, provides in part that the Diocesan Council has authority to enter into payment agreements under which a Parish or Mission in arrears on its DPA is provided time to come into compliance. Such a payment agreement may include a provision for cancellation or reduction of prior DPA. If a congregation's Diocesan Program Assessment (DPA) is more than six months delinquent with or without a payment agreement, that congregation may be assessed costs for services provided by the Diocese, including but not limited to fees for insurance management, payroll services, expenses for Bishop visitations, and costs of Convention. Failure for two consecutive years to either pay DPA or to pay assessed costs shall constitute evidence that the Parish or Mission is essentially defunct within Article 15 of the Constitution of the Diocese of Oregon.

3.8 Governance of Convocations

The Dean in each of the seven Convocations of the Diocese is the Bishop's representative to the congregations in that Convocation. It is the responsibility of a dean to:

- Encourage use of the Policies and Procedures Manual, published by the Diocese.
- Monitor congregational development and nurture cooperation in planning development of ministry of all the baptized and encourage the vision of mission.
- Nurture cooperation in strategic planning for mission/ministry within the Convocation, recognizing that at times "boundaries" must be crossed.
- Seek assistance from the Convocation president, as needed.

3.9 Governance of the Diocese

Diocesan governance centers around the annual meeting of the Diocese in Convention at a time specified by the Bishop in consultation with the Standing Committee. Each congregation will be notified by the Secretary of Convention concerning the time and the certification of delegates to the Convention. Diocesan Council has a very close relationship with Diocesan Convention. According to Diocesan Canon 3.3, "It [Diocesan Council] shall perform such work as may be committed to it by the Convention and initiate and develop such new work between meetings of the Convention as it deems necessary."

The Diocese is divided into seven geographical areas called Convocations (sometimes termed deaneries in other dioceses). The Convocations are presided over by a president (lay person) and dean (priest or deacon). The Convocation meets several times each year to preview the diocesan budget and discuss other matters of mutual concern. Each congregation is a member of the Convocation in which it is located and is represented by its clergy and elected representatives to Convocation. These elected representatives to Convocation are the same persons as are elected to serve as delegates to Diocesan Convention.

The following table may be helpful in comparing the terminology used at various levels of church government.

	Governing Body	Spiritual Leader	Presiding Officer
Diocese	Convention	Bishop	Bishop
Convocation	Convocation	Dean	President
Cathedral	Chapter	Dean	Bishop/Dean
Parish	Vestry	Rector	Rector
Mission	BAC	Vicar	Vicar

4.0 – Related To the Episcopate

4.1 Customary for the Bishop's Visitations

4.2 Preparation for Ordination

4.3 Licensed Ministers

4.4 Marriage Consent for Divorced Persons

4.1 Customary for the Bishop's Visitations

Full text of the Bishop's Customary can be found on the Diocesan website under Clergy Resources.

Scheduling

The Bishop usually schedules one visitation for each weekend and is available to the clergy and congregation on Saturday through early Sunday afternoon. Because of other occasional commitments on Saturday mornings and Sunday evenings, please consult with him before announcing what he will do in your congregation.

Purpose of Visit

The Bishop's priorities during an official visitation are to preside at the Holy Eucharist and at the Initiatory Rites, as required, preach the Word, examine the Parish Registers and other records of the life and ministry of the Clergy and Congregation.

Service Plans

Please send the Bishop's office a draft copy of the bulletin for approval one week before the visitation. The Bishop conducts services according to forms approved by the General Convention of The Episcopal Church, including The Book of Common Prayer and Enriching Our Worship. Any plan to deviate from these forms should be discussed with the Bishop before the bulletin is printed. Also, be sure to check with the Bishop before planning to use lections other than those appointed for the day.

Bishop's Participation

The Bishop will preside and preach at all Sunday morning services, at his discretion. If there is a Christian education hour, the Bishop is available for a conversation with the congregation.

Offering

The congregation is to be reminded, either through the bulletin or by announcement, that the undesignated offering is for the Bishop's Discretionary Fund, and that this offering is used for those preparing for the ordained ministry or for emergencies for which other funds are not available. (Canon 5.4.1). Special offering envelopes are available on request from the Diocesan office. Please talk to Tracy Esguerra for these envelopes

Publicity

Taking note of the Bishop's visitation in the local press, especially in small communities, may be appropriate. A photograph of the Bishop and a sample press release are available from the Bishop's office should these be needed.

Alternatives

If the services of a Bishop other than the current Diocesan Bishop are desired, please clear this with the current Diocesan Bishop prior to making any arrangements.

Overnight Accommodations

When it is necessary for the Bishop to spend a night out of town, the Bishop's Office will make the arrangements. When he stays in a motel, the Diocese will pay the cost of these accommodations.

Bishop's Hospitality

At some time during the weekend, the Bishop may want to entertain the clergy for a meal, at a place mutually agreeable to all.

4.2 Preparation for Ordination

The Ordination Process in the Episcopal Church is designed to test the validity of the call, provide academic and spiritual preparation and sufficient time to demonstrate an individual's commitment. There are many requirements for ordination. The usual length of time from initial visit with the Priest-in-Charge (the member of the clergy in charge of the congregation of which the person is a communicant) to ordination will be about five years. The time provides significant opportunity for personal growth and new awareness of one's vocation within the Body of Christ. There are, however, no guarantees that ordination (or employment in the Church) is certain. By its very nature, the ordination process requires all to be open to God's leading into new and unexpected opportunities.

Please reference Title III of the Canons of the Episcopal Church; and The Ordination Manual published by the Commission on Ministry (COM) of the Diocese of Oregon on our Diocesan website.

4.3 Licensed Ministers

The Bishop approves licensure by request from the clergy member in charge of a congregation. See Sec. 3.1 for more detail. Additional information can be found in the Licensed Ministry Manual on the Diocesan website.

4.4 Marriage Consent for Divorced Persons

General Instructions:

A request for consultation and consent for the marriage of divorced persons is required under Title I, Canon 19 of the Canons of the Episcopal Church.

Processing the Forms:

- The REQUEST FOR CONSULTATION AND CONSENT LETTER, indicating the proposed date of the marriage, must be filled out by the presiding minister and received in the Bishop's office no less than 30 days prior to the proposed wedding date. The form is found on our Diocesan Website.
- The LETTER GRANTING CONSENT FOR A MINISTER TO SOLEMNIZE A MARRIAGE, will then be initiated by the Bishop (who fills in the top half of the form), and sent to the presiding minister, who will in turn, complete the bottom half of the form (titled, REPORT OF MARRIAGE) and return it to the Bishop's Office. (The original must be returned; the presiding minister is encouraged to keep a copy.)

Should the plans for the marriage be cancelled, both forms are to be updated to reflect the cancellation and returned to the Bishop's Office.

5.0 – Personnel Practices for Clergy

Preface

5.1 Vacancies: Rector or Vicar or Deacon

5.1.1 Options for Filling Such Vacancies

5.1.2 Full Search Process for Rector or Vicar

5.1.3 Negotiations/Covenant of Ministry

5.2 Compensation And Benefits

5.2.1 Compensation Policy

5.2.2 Housing and Utilities

5.2.3 Church Pension Fund Contributions

5.2.4 Health Care

5.2.5 Group Life and Other Insurance

5.2.6 Automobile Transportation

5.2.7 Professional Expenses

5.2.8 Continuing Education

5.2.9 Discretionary Fund

5.3 Clergy Wellness

5.3.1 Responsibilities of Clergy for Self

Preamble

Standards

5.3.2 Vacation and Leave

5.3.3 Sabbatical Policies

5.4 Pastoral Care & Spiritual Direction

5.5 Mutual Ministry Review

5.5.1 Annual Evaluation

5.5.2 Review of Mutual Ministry

5.6 Clergy Retirement

Preface

The Diocese of Oregon has established personnel practices and policies to provide both clergy and lay leadership with consistent guidelines for fair and effective relationships between clergy and congregations.

It is assumed that all situations and circumstances cannot possibly be covered by one personnel policy statement. It will be the responsibility of the Bishop in consultation with the Personnel Committee, the Standing Committee, and the Diocesan Council to interpret policies and procedures wherever necessary, as circumstances warrant.

The Clergy Manual addresses many of the points addressed below.

5.1 Vacancies: Rector or Vicar or Deacon

Short term leaves such as a lengthy illness or incapacitation, educational leave, sabbatical leave or the like are discussed in Section 5.3.

Long term vacancies of parish or mission clergy may occur for a number of reasons. The purpose of this section is to describe the process used in the Diocese of Oregon in the search for the new vicar of a mission or the rector of a parish.

The search for an ordained person to fill a vacancy as rector, vicar, or priest-in-charge is an important and far-reaching events in the life of a congregation. Most congregations are vulnerable at this time. Members may act out of concern for the future, fear of change, or a desire for change. Communication often becomes difficult, and leadership often lacks focus during a vacancy. Congregations also find, however, that searching for a new priest is a time for hope and an opportunity for renewal.

While the emphasis naturally falls upon calling a new priest, it is equally important that the congregation use this time to better understand its mission, reevaluate its goals, recognize and deal with problem areas, and prepare itself for new leadership.

5.1.1 Options for Filling Such Vacancies

This section describes 1) the collection of information from both clergy seeking deployment and of congregations seeking the services of a priest or deacon, and 2) ways of filling vacancies.

OF THE CLERGY: Those interesting in a new position as priest or deacon in a congregation are asked to send the Bishop and the Canon to the Ordinary a one page letter outlining the following:

- A little bit about yourself -- your background, history, strengths, what you're good at, what your passions are.
- What type of situation you are seeking: Full time, part time, location in the diocese you see yourself able to work and live. Please be as specific as possible.

This information will be kept on file and used when discussing with congregations the personnel and resources available.

OF CONGREGATIONS: Congregations seeking to employ a priest or receive the services of a deacon are asked to send a short letter outlining what it is you are looking for. What sort of position are you offering: full time, part time? What is the time frame you are hoping for? Please include the contact information of the Senior Warden.

TO CLERGY AND CONGREGATIONS: The Bishop offers clergy and congregations a deployment system that is clear and uncomplicated, and that includes several options for working on deployment issues.

- a. **Full Search:** Congregations can go through a full search process involving an interim, the development of a parish profile, a time of seeking candidates followed by the calling of a new priest. This process is normally the longest, but gives the congregation the most control of the process. (See Section 5.1.2 for detailed information on the steps involved in this option.)
- b. **Assisted Search:** This process is similar to the Full Search except that resumes of potential candidates come to the Bishop and the Canon to the Ordinary for first vetting before they are sent to the congregation's search committee. The search committee then takes over with interviewing and recommendation to the vestry/BAC.
- c. **Priest-in-Charge:** In some cases, congregations may opt for a modified process whereby the congregation develops a profile to be given to the Bishop, who will then suggest a few specific priests to be interviewed for the position of priest-in-charge. The church would then interview the candidates and decide if they are willing to accept one of the Bishops' suggestions. In this case, the new priest would serve for a specific, agreed upon amount of time in the position and then be eligible for election as rector or vicar.
- d. **Appointed:** In certain cases the Bishop may appoint a priest to a position for a time to stabilize a challenging situation. This would be done in consultation with parish leaders.
- e. **Deacons:** Deacons are appointed to a congregation by the Bishop. Deacons wishing to move to a new congregation are invited to write to the Bishop and Archdeacon to request consideration of a move. Churches seeking the services of a deacon will work with the Bishop's office to see what potential matches are available.

5.1.2 Full Search Process for Rector or Vicar

The process takes time...up to a year. It is essential that these tasks be accomplished and that the congregation not rush into the calling of a new priest. The process involves all members of the congregation and its leaders, the Bishop and the Canon to the Ordinary and/or a consultant.

The congregation may require the services of an interim priest during the search process to be sure that the pastoral, worship and administrative needs of the congregation are met. The Bishop's office can be of assistance in identifying persons qualified for such a role. Considering the interim priest, the consultant, or assistant clergy for the vacant position is not an option. This is avoided because the objectivity and effectiveness of the process can be impaired. In the extremely rare case that a suspension of this rule may be warranted, specific approval must be obtained from the Bishop's office.

The structure and design of the search process is the prerogative of the Bishop. The process currently in use in the Diocese of Oregon is described in the following sections.

Step I: Development of the Parish Profile

(Time line: approximately three to four months):

The Bishop is informed of the resignation or retirement of a priest. A meeting of the Bishop or Canon to the Ordinary and the vestry/BAC is scheduled as soon as possible. The Bishop or Canon to the Ordinary will describe the search process and talk over all considerations regarding the transition.

The vestry/BAC directs the development of the Profile. (They may appoint a committee to do this work). The Canon to the Ordinary and/or consultant will guide and support this work.

The Bishop must approve the profile before publication. The Convocation Dean may also review and comment on the profile prior to publication.

The profile will be shared with the whole congregation and a link to it put on the congregation's web site. An electronic copy will be sent to the Bishop's Office, to be sent to priests interested in the position.

Model Profile Outline

- 1) Letter of introduction explaining why the profile was developed, who was the previous rector/vicar, and the circumstances of their leaving.
- 2) Mission statements and goals.
- 3) History of the congregation; what is unique about this congregation.
- 4) Current programs, organizations, and liturgical style. Pictures are encouraged.
- 5) Present staff and their duties, clerical and lay, paid and volunteer.
- 6) Current financial status, including operating budget, treasurer's report, endowments, memorial funds. Stewardship report, including number of pledges, total amount pledged, description of stewardship program and five-year pledge history. Detail of all outstanding debt. Five-year DPA history.
- 7) Demographics of the congregation, including number of parishioners; average Sunday attendance; congregational breakdown according to age, occupation, ethnic origin, and education; residential patterns; average length of time in the parish and the Episcopal Church.
- 8) Description of the community, including history, demographics, education, school systems, business opportunities, local government, and recreation.
- 9) Description of all buildings and present condition. Include all property owned by the church. Current pictures.
- 10) Results of the parish survey concerning the gifts sought in the new priest, including a description of the survey process and a report of the analyzed data.
- 11) Areas of ministry and focus, including current emphasis to be continued and built upon; new ventures and opportunities for ministries.
- 12) A brief position description for the new priest, including particular skills, areas of emphasis, responsibilities, and pastoral specialties.
- 13) Compensation: Spell out the range offered in the Stipend Housing Utilities (SHU) chart and how this relates to the diocesan standard. Note also additional benefits: medical insurance, moving expenses, vacation, study and sabbatical leave, and any other items.

Step II: Development of Search Committee/Development of Nominees List

(Time frame - two months. May overlap with Step I):

Around the Bishop's approval of the profile, the Vestry/BAC selects and directs the Search Committee. One or more Vestry/BAC members, one or more persons from the profile committee and other persons from the congregation are chosen to provide a balanced group for the Search Committee.

The Vestry will develop a clear charge to the Search Committee which includes the theology of a call, the role of prayer, the Vestry's expectations for this committee (e.g. number of finalists, rankings, special skills, etc.), and a budget for the Committee.

The Search Committee will be trained by the Canon to the Ordinary and/or consultant with emphasis on:=-

- Confidentiality
- Affirmation of the ministry of all nominees
- Discretion when visiting the nominee's congregation
- Hospitality and care for nominees and spouses during visitations
- Correspondence to be prompt, regular and courteous

The Canon to the Ordinary and/or consultant will provide training for the Search Committee in the following areas as needed:

- Interviewing (phone, Skype, and in person)
- Profile reading and use of resumes
- Visits to clergy in their church
- Reference checks
- Fair presentation and review of all nominees
- Standardization of questions for interviews, reflecting the Profile prepared in Step I.

Simultaneous with Steps I and II, names of any nominees for the position will be sent to the congregation Search Committee chair or the Bishop's office. Sources for nominee's names include suggestions from parishioners, expressed interest of a person, the Office of Transition Ministry, and the Bishop's recommendations. In all search processes except for the Full Search, nominees will be preliminarily screened by the Bishop's Office for the following:

- Interest
- Preliminary background check
- Appropriateness of skill/experience for the congregation based on the Profile.

The Bishop's office will then provide this list of nominees to the congregation Search Committee for further screening and interviews. The Search Committee will inform the Bishop's office of the closing date for receiving nominations. In the Full Search process, names and resume materials go directly to the Search Committee chair for screening and preliminary interviews by the Search Committee.

Step III: Initial Screening and Interviews

(Time frame - three to four months)

The Search Committee will screen the nominees from the list of those who have applied, either directly if a Full Search, or from the list supplied by the Bishop's Office.

The Search Committee will conduct interviews by telephone, questionnaires, Skype, and/or visits in the priest's congregation.

A finalist list of nominees will be sent to the Bishop for approval. Upon receiving this list, the Bishop will have a formal background check done on each nominee. The cost of this background check will be paid by the congregation. The Bishop may remove a priest's name from consideration.

Nominees on final list will :

Visit with the Search Committee and Vestry/BAC (only) at the church, usually in the form of a hospitality event of some kind and a Holy Eucharist service

Meet with the Bishop if possible in the Bishop's Schedule.

Be apprised of preliminary negotiations.

The Vestry/BAC chooses and issues the call for the new rector/vicar/priest-in-charge from the finalist list and negotiates a Covenant of Ministry (Letter of Agreement) with that person. When completed and signed, the Vestry/BAC notifies the Bishop and sends the Covenant of Ministry to the Bishop for approval and signature.

Search Committee Reminders

Do not publish nominees' names

Do not invite the nominee to "audition" in the vacant parish

Do not insist on the presence and/or participation of clergy spouse

Do not make random phone calls to nominee's parish or others acquainted with the nominee

Do not engage in idle gossip about nominees

Do not lose touch with the nominees or the congregation or the vestry/BAC in the process

Do not lose touch with the Canon to the Ordinary or the consultant if you use one

Do not lose touch with the Bishop

Say your prayers. Do not lose touch with God.

5.1.3 Negotiations/Covenant of Ministry

(Time frame - one month)

The following materials are provided for the time when negotiations commence between the person called and the Vestry/BAC:

- A copy of the most recent diocesan clergy compensation schedule (SHU chart),
- A copy of the current Clergy Manual
- A draft of the Covenant of Ministry including a position description

[NOTE: Samples of the Covenant of Ministry may be found in Appendix 8.3.1]

5.2 Compensation And Benefits

5.2.1 Compensation Policy

A compensation policy for full time stipendiary clergy in the diocese was established by convention in 1983, revised in 1985, and again in January 1991. The objectives of the policy are to provide guidance to the congregations and clergy to establish fair and appropriate compensation throughout the diocese using criteria which recognizes differences in the complexities of the job of a priest in charge in both small and large congregations, and the norms of the Episcopal Church. The policy provides for annual mutual ministry review, covenants of ministry setting forth expectations of both clergy and congregation, and a method of placing congregations in ranges of administrative complexity.

The policy states a cash stipend be provided by the congregation in an amount equal to or greater than that listed in the Stipend, Housing, Utilities (SHU) Chart authorized by Diocesan Council and updated annually by the diocesan Personnel Committee. SHU for part-time clergy shall be calculated by applying their full-time equivalent (FTE) to the amount scheduled for the position based on the range and years of experience in the equivalent range. The nine ranges address a minimum for the transitional diaconate, six types of congregations, and compensation levels for a Suffragan Bishop (if there is one) and the Diocesan Bishop. The ranges are calculated from data contained in the parochial reports received by March 1 of each year.

(NOTE: A table for the current SHU range structure, based on the most recent parochial reports, is found on the diocesan website.)

5.2.2 Housing and Utilities

Housing and utilities are provided by the congregation to stipendiary clergy in one of two ways:

- Provide a house and directly pay for utilities, maintenance, repairs, mutually agreed improvements and telephone (except for personal charges); or
- Provide a housing allowance in an amount requested by the priest and approved by the Vestry or BAC prior to payment to the clergy person.

5.2.3 Church Pension Fund Contributions

Pension premiums for stipendiary clergy are paid by the congregation.

5.2.4 Health Care

Premiums for medical and dental insurance, for stipendiary clergy assigned to parishes and missions, whether full or part time (20 hours per week, 1,000 hours per year, minimum), and their eligible dependents, shall be at least 80% paid by the congregation, and no more than 20% by the clergy. Premiums for diocesan staff clergy are paid through the diocesan budget.

5.2.5 Group Life and Other Insurance

Group Life Insurance is provided for all diocesan clergy employed half-time or more. Beneficiaries of this policy are determined by the clergy, and premiums are paid by the congregations for their clergy and the diocesan budget for staff clergy. There are additional death benefits provided by the Church Pension Fund. Worker's Compensation Insurance premiums are paid by the congregation.

5.2.6 Automobile Transportation

Automobile transportation is provided by the congregation in one of two ways:

- Provide an automobile expense account from which automobile expenses based on the mileage rate (recognized by the IRS for income tax expense deduction purposes) will be paid, based on submittal of actual mileage accumulated while on church business.
- Provide an automobile including insurance, maintenance and work-related operating expense. (If a car is provided, then accurate records must be kept to document when it is used for church business and when it is used for personal activities, and any personal use is taxable and must be reported to the IRS.)

5.2.7 Professional Expenses

Professional expenses such as subscriptions to professional journals, dues for memberships in professional organizations, reimbursement for entertainment expenses, etc. are subjects for mutual agreement.

5.2.8 Continuing Education

A Continuing Education allowance is provided by the Congregation. Priests are also entitled to up to two weeks of continuing education leave each year that is not charged as annual leave.

5.2.9 Discretionary Fund

A Discretionary Fund is provided monthly for the pastoral use of the clergy. The Fund may be established either by assigning the undesignated offering one Sunday a month for that purpose, or by line item in the congregation's budget. Please see Appendix 8.4 for further information on Discretionary Funds.

5.3 Clergy Wellness

The health and well-being of the clergy of the Diocese is an important part of the well-being of the Church. The Diocese requires a Covenant of Ministry (also called a Letter of Agreement) for rectors, vicars, associates, assistants, priests-in-charge, and deacons. In this Covenant of Ministry, all benefits are listed including medical and dental Insurance, sick leave, pension, continuing education time and funds, and Sabbatical planning. These covenants of ministry also provide for annual vacation and a variety of National Holidays. Clergy are encouraged to participate in regional Clericus groups and in peer support groups.

There is available through the office of the Bishop a Clergy Support Fund to meet unexpected financial emergencies. Also available are funds for Theological Education, often used to partially fund sabbaticals for clergy.

For the clergy person's own sake, and for the sake of the mission of the diocese, it is expected that clergy attend to their physical health, their emotional and spiritual wellness, and their personal relationships.

5.3.1 Responsibilities of Clergy for Self

Preamble

As deacons, priests, and Bishops, we have promised to pattern our lives (and those of our families, households, or communities) in accordance with the teaching of Christ, so that we may be wholesome examples. One part of this commitment is to care for God's gift which we embody in ourselves and thus proclaim in deed as well as word the Gospel of Jesus Christ by fashioning our lives in accordance with its precepts.

Standards

- 1) We give adequate attention to our spiritual health by observing daily times for prayer, spiritual direction, scripture reading, and meditation with the Daily Office as the guide in our tradition.
- 2) We give adequate attention to our physical health, including regular check-ups, regular exercise, healthy eating habits, and moderation/abstinence in any use of alcohol, tobacco, or drugs.

- 3) We give adequate attention to our emotional health, and when there is need, identified by ourselves, our families, friends or colleagues, will seek professional help.
- 4) We spend intentional and significant time with our family, household or community.
- 5) We observe at least two days off work each week, or their equivalent, and endeavor to enlist our parishioner's support in honoring these times of rest.
- 6) We take one full month each year for vacation as time for recreation and renewal, plus compensatory time off after especially busy times, such as Christmas and Easter. (See Section 5.3.2, below, for further information on Vacation and Leave Policies.)
- 7) In accord with the policy of the Diocese of Oregon, we make every effort to reach mutual agreement with our congregations and/or ecclesiastical authority to plan for periodic sabbatical leave or an equivalent for refreshment, renewal, and growth. (See Section 5.3.3, below for further information on Sabbatical Policy.)
- 8) We maintain a regular program of continuing education in consultation with clergy colleagues, our bishop, and congregational representatives.
- 9) We maintain regular contact with other colleagues, through clergy associations, clericus, and colleague groups.
- 10) We seek avenues of community involvement and/or friendships which allow us to relate to others where we are not the clergy/congregational leader.
- 11) We practice responsible stewardship of our financial resources. We accept the tithe as a minimum standard of giving, and if we are not already tithing will adopt a systematic plan of moving towards that minimum.
- 12) We participate in Diverse Church (Anti-Racism) Training and Safe Church Trainings. (See Sections 3.4 and 3.5.)
- 13) We 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 Convention. Such participation is considered to complement local duties, not to conflict with them.
- 1) We are bound by and familiar with the Constitution and Canons of the Episcopal Church, the Constitution and Canons of the Diocese of Oregon, and the by-laws (if any) of the local congregation, giving special attention to the disciplinary materials of Title III and Title IV of the Canons of the Episcopal Church.

5.3.2 Vacation and Leave

- 2) Vacation leave of one month (30 calendar days) each year with normal stipend and allowances is the norm for all stipendiary clergy.
- 3) Day(s) off are a matter of mutual agreement as is the weekly schedule of full stipend clergy. Two days off each week is the minimum expected.
- 4) Emergency and other leaves for illness, death in the family, and other emergencies may be allowed under conditions established by mutual agreement with the vestry or BAC. The normal length of maternity leave is six (6) weeks and paternity leave is two (2) weeks.
- 5) Participation in other diocesan activities such as clergy conferences, department or committee work, retreats, family camps, diocesan camps and other conferences are not to be counted as days off, vacation or study leave time as these are considered job related responsibilities.
- 6) Supply clergy will be provided by the congregation during authorized leaves and may be provided by negotiation at other times. (Current minimum compensation for supply clergy is listed in Appendix 8.3.10)

5.3.3 Sabbatical Policies

The Bishop, and clergy with cure in the Diocese of Oregon, are encouraged to take periodic sabbatical leaves. Provision for sabbatical leave is to be included in Covenants of Ministry, specifying the conditions acceptable to clergy and congregation. Congregations and diocesan institutions are encouraged to consider sabbatical leave for other clergy and lay staff. These guidelines will serve as a useful beginning point for discussion. Consultation is available from the diocese.

The decisions around which congregation and clergy plan for sabbatical leave should include consideration of on-going parish life and the financial situation of the congregation. Advance plans should begin at least nine months before the proposed sabbatical.

Sabbatical leave is for the welfare of both the Rector/Vicar and the congregation and is to be taken during the tenure of the Rector/Vicar, not at termination, and will not be paid as compensation when the Rector/Vicar leaves the parish. At the end of a sabbatical leave, the Rector/Vicar must return to this congregation for one calendar year or more.

The usual length of sabbatical leave is three months after five years of service. Sabbatical time does not accumulate. Other terms, such as a longer leave or greater frequency of leave, may be negotiated in a Covenant of Ministry. Credit for time served toward a sabbatical in one position does not transfer to a new position unless specifically granted as a benefit in the initial Covenant of Ministry.

During sabbatical leave the normal compensation package is maintained. Sabbatical expenses including travel, meals, tuition, and housing are to be negotiated. It is expected that clergy will provide one-third of the actual sabbatical costs, and the parish one-third. The Bishop's Office will be asked to review the plan and provide the remaining third.

The vestry/BAC will determine the overall program needs of the congregation during the time of the sabbatical, a Sabbatical Management Plan will be developed by the vestry/BAC or its designated committee.

The Sabbatical Management Plan is to be completed and approved three months prior to the leave. The plan includes:

- 1) Details and accountabilities, including financing
- 2) The clergy sabbatical plan
- 3) Procedure for engaging the congregation in the sabbatical
- 4) Provision for clergy re-entry into the life of the community
- 5) Return celebration

5.4 Pastoral Care & Spiritual Direction

- 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.
- Clergy are to seek appropriate professional assistance for their own personal problems and conflicts, especially those that might impair their pastoral ability and judgment.
- 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.
- Reconciliation of a Penitent is a sacramental act 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 not be broken. However, if the penitent confesses to child sexual abuse, the confessor can and should withhold absolution and notify the authorities.
- 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.
- 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. Clergy are subject to Oregon law requiring the reporting of child abuse and elder abuse and must be familiar with and strictly comply with all applicable laws and rules. Clergy are to take counsel with the Bishop and Chancellor of the Diocese when addressing these matters.

5.5 Mutual Ministry Review

5.5.1 Annual Evaluation

Annual Evaluation of the ministries of the clergy and lay leadership of the congregation will be scheduled each year as provided in the Covenant of Ministry. Persons outside the parish or mission may be invited by the clergy and congregation leaders for the purpose of consultation during the evaluation process.

Key areas of performance are to be agreed upon by the clergy and the vestry/BAC and are related to the congregation's expectations of the clergy and the clergy's expectations of the congregation as expressed in the Covenant of Ministry.

5.5.2 Review of Mutual Ministry

A review of mutual ministry is a format developed to assist congregations in an orderly effective evaluation process, based on the premise that goals for a congregation's ministry are mutually established by laity and clergy working together and the performance of both is dependent on mutual commitment and action. Those congregations familiar with widely used goal-setting techniques can follow the process on their own. Some congregations will feel more comfortable with the assistance of one of the diocesan consultants who are available.

Every parish and mission congregation should articulate its purpose in current, functional and spiritual terms. A statement of this purpose or mission in the life of the church is developed through mutual prayer, discernment and discussion by clergy and laity in the congregation. This Mission Statement then forms the basis for the future life of this part of the body of Christ.

An effective Mutual Ministry Review requires a continuous planning process to assure the congregation's commitment to the Mission Statement and the translation of that statement into goals, objectives, and specific plans. (See 8.3.12 for sample of Mutual Ministry Guide)

The process takes place at a time and location free from distractions and interruptions. Participants are the clergy, vestry/BAC, and may include other elected officers and those involved with leadership roles for education, music, worship, youth, outreach, etc.

Those participating should be committed to the concept of growing in mutual ministry, and expect to participate fully throughout the year.

The congregation's review of mission and ministry over the past year and goal-setting can be accomplished in many ways. Congregations with established processes have developed a style which fits their needs. Those new to the process should refer to appendix 8.3.12a for the Mutual Ministry Guide 3.

Plans developed for the congregation, the clergy, and lay leadership can be refined, coordinated, and specific action plans prepared,

Action plans list a series of specific projects or elements describing what is to be done, what resources are required, how progress and success will be measured, and who is accountable for the element of the plan.

The Mutual Ministry Review process that provides opportunity for the special skills, leadership and experience of the clergy and laity to be identified and applied to ensure the effective use of resources, enhance the results, and provide positive growth in the relationships of this spiritual family.

5.6 Clergy Retirement

Preamble

When a priest resigns or retires from a church, out of consideration for the effective growth of the congregation under new leadership, it is essential that certain guidelines are followed, especially if he or she chooses to remain in the community. The effectiveness of this is largely dependent on the retiring or resigning clergy's willingness to state clearly and to adhere faithfully to this policy. Following are a set of guidelines to be communicated in a letter to the congregation distributed shortly after one's announcement of resignation or retirement.

Standards

The rector's or vicar's resignation or retirement, effective on a certain date, signifies the understanding that all priestly, pastoral and administrative duties in this parish are terminated as of this date.

- 1) It is further mutually understood that this applies equally to the interim period before another rector/vicar assumes office, since the congregation needs some time and space between clergy to discover who they are now, where they want to go, and with what new leadership. It is agreed that this vestry/BAC will make provision for other interim pastoral and priestly ministry for the congregation.
- 2) The former rector/vicar agrees that he/she will not officiate or assist any baptism, wedding, funeral, or any other sacramental act in this parish. This will prevent divided loyalties in the congregation and pressures on either the former or future clergy or interim clergy. The former priest may exercise ministry in other churches as invited.
- 3) The former rector/vicar will not make pastoral visits in the hospital or home with former parishioners without prior consultation with the interim priest or the new rector/vicar.

- 4) It is further agreed that the rector/vicar, now and after his/her retirement, will not take part in any way in the process of the selection of either an interim priest or the new permanent priest, except for an exit interview with the vestry/BAC's consultant if such is requested. He/she will not make any suggestion of clergy who might be considered for either position, nor make any comment on the qualification or lack thereof of any person under such consideration.
- 5) It is expected that the former priest will no longer use the resources of the church office and/or staff.
- 6) It is important for the diocese to keep regular contact with the person who has retired or resigned who still lives in the diocese and/or in the community in which they served, and help clergy continue to develop their vocation.

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 only accept unsolicited invitations from the Interim Rector/Vicar or Rector/Vicar.

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 clergyperson 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 clergyperson with oversight must be informed.

6.0 – Lay Personnel Policy

6.1 Introduction

6.1.1

6.1.2 Parish Personnel Committee.

6.2 Staffing

6.2.1 Congregation/ Parish Lay Staff

6.2.2 Diocesan Lay Staff:

6.2.3 Employee Classifications

6.3 Compensation

6.3.1 Diocesan Office

6.3.2 Congregations

6.4 Benefits

6.5 Continuing Education and Conferences

6.6 Leave Time

6.6.1 Holidays

6.6.2 Paid Vacation

6.6.3 Sick Leave

6.6.4 Family, Maternity and Parental Leave

6.6.5 Special Leave Time

6.6.6 Unpaid Leave

6.7 Work Week, Overtime, Time Records, Breaks, Lunch Period

6.7.1 Work Week

6.7.2 Overtime

6.7.3 Time Records

6.7.4 Breaks and Lunch Period

6.8 Employee Reviews

6.8.1 Evaluation Reviews

6.8.2 Salary Adjustments

6.9 Voluntary Termination

6.1 Introduction

The policies and procedures set forth here apply only to persons employed by the Diocese of Oregon. Please see the Diocesan Personnel Manual found on the Diocesan website for details. The Diocese acknowledges and supports the independence of congregations located within the diocese and encourages their adoption of similar policies for persons employed by their respective vestries and BACs. The policies set forth in this manual do not constitute an employment contract. All diocesan employees are determined to be employees at will unless specified otherwise in writing. Insofar as practical, these policies apply to the diocesan office, unless the diocesan office establishes different policies to address the same subject matter in consultation with, and agreement by, the Diocesan Personnel Committee.

6.1.1 Diocesan Personnel Committee

The Diocese of Oregon is committed to abiding by the state, local and federal laws as they relate to employment conditions and opportunities. The Diocese affirms its commitment to a policy of equal employment opportunity in terms of race, color, national origin, sexual orientation, age, marital status and disability. These policies and procedures are based upon recommendations made by the Diocesan Personnel Committee and approved by the Diocesan Council. Policies and procedures may be altered by the Council, as legal requirements or changes to operating conditions evolve, when recommended by the Personnel Committee. The Personnel Committee recommends that each vestry or Bishop's Advisory Committee (BAC) within the Diocese of Oregon conduct an annual review of their congregation's personnel policies to remain consistent with all legal and canonically required policies.

6.1.2 Parish Personnel Committee.

While congregations are independent, legal entities within Oregon, the Diocesan Council recommends that each congregation have a personnel committee. Congregation personnel committees operate through the leadership of the Rector/Vicar and vestry/BAC. The committee should include the Rector/Vicar and wardens, and up to three other persons. The purpose of the committee is to accomplish the following activities:

- Develop and disseminate current job descriptions for paid and volunteer lay staff.
- Review changes in duties, hours and compensation for paid lay staff.
- Review and recommend to the vestry/BAC changes in benefits for paid personnel.
- Report annually to the vestry/BAC on actions or recommendations pertaining to staff.
- Interpret personnel policy as requested.

6.2 Staffing

6.2.1 Congregation/ Parish Lay Staff

The Diocesan Personnel Committee recommends that congregations adopt lay staffing policies similar to those listed below for diocesan lay staff. As individual employers, each congregation has a responsibility to define the employment atmosphere of people they employ.

6.2.2 Diocesan Lay Staff:

Program Staff are generally classified as "exempt" from recordkeeping and overtime provisions of the federal Fair Labor Standards Act (FLSA). Exempt employees are salaried and must meet the criteria established by the U.S. Department of Labor for classification as "exempt". Compensatory time off for hours worked in excess of 40 per week may be granted at the discretion of the supervisor. The granting of compensatory time to an exempt employee is not to be interpreted as hourly, non-exempt compensation.

Support Staff are classified as "non-exempt." Support staff includes secretaries, other office workers and maintenance staff. The following employer requirements apply:

- Log and keep time and work records.
- Pay at least minimum wage.
- Pay overtime compensation for all hours/time worked in excess of 40 per week.

6.2.3 Employee Classifications

- 1) Regular full-time employees are those employed to work a normal schedule of 40 hours per week. Full-time employees are eligible for all benefits provided and paid for by the Diocese of Oregon.
- 2) Regular part-time employees are scheduled to work 20 or more hours per week but less than full-time. They are eligible for all benefits provided and paid for by the Diocese of Oregon.
- 3) Part-time employees are persons scheduled to work less than 20 hours per week and are paid on an hourly basis. This category of employee is not eligible for employee benefits.
- 4) Temporary employees are persons hired for a limited, pre-determined period of time not to exceed one year. Temporary employees may work any number of hours up to and including full-time. They are not eligible for employee benefits. A temporary employee who subsequently becomes a regular employee will be eligible for benefits on the same basis as a newly hired permanent employee, however, the benefits will not be retroactive.
- 5) Contract employees are those who are employed under a contract between the diocese and an individual person or company. All terms and conditions of employment are subject to the provisions of the contract negotiated between the two parties.

6.3 Compensation

6.3.1 Diocesan Office

The Diocese intends to offer wages and benefits that promote retention of lay employees and provide economic rewards associated with human investment. As a minimum this includes:

- Annual wage adjustment.
- Wage adjustments are based on growth of the Consumer Price Index for the Portland metro area (CPI-U, Portland) as determined by the U.S. Department of Labor. In the event of declining economic times and a negative CPI-U Portland ratio, wage adjustments will not extend below zero growth.
- Wage increases greater than the CPI-U growth rate are to be presented to and authorized by the Bishop or Bishop's designee.

6.3.2 Congregations

The Diocese expects congregations to offer benefits and wages that promote retention of employees and provide economic rewards comparable to similar positions in the local geographic workforce. Each congregation is responsible for checking with non-profit organizations in their immediate area for guidance to determine the rates of pay offered for various types of work similar to those performed for the congregation. Employees are to be paid at least the minimum wage rate established by the Fair Labor Standards Act and those guidelines established by the Oregon Bureau of Labor and Industries (BOLI). Updates on minimum wage requirements are sent to all employers by BOLI.

6.4 Benefits

All diocesan employees are provided Unemployment Insurance, Social Security, and Workers' Compensation coverage irrespective of their employee classification. The Diocese provides a pension program for diocesan staff employed either full-time or part-time (20 hours per week, 1,000 hours per year, minimum), within the parameters of the Church Pension Fund rules and the enabling resolution of convention.

Congregations are to provide a pension program, medical and dental coverage to regular full time and regular part time employees, and medical coverage for their dependents. A congregation may elect to provide other benefits such as group life insurance or disability insurance.

6.5 Continuing Education and Conferences

Staff attendance at meetings, conferences, seminars or continuing education, if related to the employee's job and if requested or approved by the supervisor, is considered normal working hours, and is compensated accordingly.

6.6 Leave Time

6.6.1 Holidays

The following are designated as paid holidays for all regular full time employees. Part time and temporary employees are not paid for days off.

- New Year's Eve and Day
- Martin Luther King, Jr. Day
- Presidents' Day
- Good Friday
- Easter Monday
- Memorial Day
- Independence Day
- Labor Day
- Post-Convention day
- Thanksgiving Day and the following day
- Christmas Eve and Day
- Employee Birthday

Additional holidays may be authorized by the Bishop.

When paid holidays fall on a Saturday or Sunday, they will be observed either on the preceding Friday or the following Monday respectively.

6.6.2 Paid Vacation

Paid vacations are provided for full-time and part-time employees, both exempt and non-exempt, in the amount of twenty (20) paid days per calendar year, accrued on a basis of 1 2/3 days per month. Holidays that fall within the scheduled vacation are not counted as vacation. Temporary employees are not eligible for vacation. Illness that occurs during scheduled vacation may be charged as personal absence leave rather than vacation upon presentation of a doctor's certificate to the employee's supervisor. At termination, employee will receive pro-rated pay for unused vacation time.

6.6.3 Sick Leave

Paid sick leave is intended to minimize the economic effect of illness or accident of the employee or member of the employee's family as defined by Oregon law. Employees accrue one day per month for sick leave beginning with the first date of permanent employment. Sick days may accrue up to 30 days and have no value upon termination of employment.

6.6.4 Family, Maternity and Parental Leave

The Diocese grants leave to diocesan staff under the provisions of the Family Medical Leave Act and the Military Caregiver Leave Act. Allowable leave for eligible employees can be up to 12 weeks for child care or up to 26 weeks of military caregiver leave to care for a covered service member with a serious injury or illness during a 12-month period. Refer to FMLA (Family and Medical Leave Act) and OFLA (Oregon Family Leave Act) for eligibility details.

6.6.5 Special Leave Time

Time off with pay for jury duty, military service, or funerals is granted by the supervisor as circumstances dictate.

6.6.6 Unpaid Leave

With suitable advance notice, unpaid leave time over and above paid leave may be granted by the supervisor for special circumstances.

6.7 Work Week, Overtime, Time Records, Breaks, Lunch Period

6.7.1 Work Week

The normal work week is defined as Monday through Sunday. An employee's supervisor may establish a variation to the normal work. Variations are to be recorded on the employee's job description.

6.7.2 Overtime

Payment of overtime compensation is required to all non-exempt employees working in excess of forty hours per work week. All overtime compensation is to be paid at one and one half times the employee's normal hourly pay rate. Only hours worked in excess of forty in the work week are paid at the overtime rate.

Non-exempt employees must be paid overtime compensation when incurred. They may not be granted time off in lieu of overtime compensation (even if it is calculated at time and one-half) and they may not voluntarily "elect" out of overtime compensation. Compensatory time off within the same work week may be granted so that total hours for the week do not exceed forty.

The work week is defined by the employer and communicated to employees. Once established, the work week may not be changed for the purpose of avoiding payment of overtime compensation. Employees may be required to work overtime because of the nature of the work load. The supervisor will give as much advance notice as possible when this occurs. Employees may not work overtime hours without advance approval from their supervisor.

6.7.3 Time Records

The Diocese will maintain accurate records of time worked by all non-exempt employees. The time record insures accurate payment of wages and overtime, and records appropriate breaks. It also provides a record of vacation, holiday and leave taken. Either the employee or the supervisor may record time for the work week, but both must sign the record to certify accuracy.

6.7.4 Breaks and Lunch Period

Full time employees are provided two paid 15-minute rest periods for every four hours of work. Additionally, employees are entitled to up to 30 minutes for a lunch break at a time agreed upon with the supervisor.

Part time employees are granted the number of rest periods and lunch breaks in proportion to the length of their work day on the same basis as full time employees.

6.8 Employee Reviews

6.8.1 Evaluation Reviews

At least once annually, each employee of the Diocese of Oregon will have the benefit of an evaluation review and appraisal with her/his supervisor. Reviews are intended to provide a mutual opportunity to celebrate successes, provide clear and reliable feedback, to minimize or eliminate unrealistic expectations and to renew professional goals, in addition to evaluating job performance and accountability. The employee's position description is a critical tool in this review.

This evaluation review normally has two parts: (1) a written self-evaluation by the employee reviewing job descriptions, goals, strengths, areas needing improvement, and general comments; and (2) a written appraisal of the employee's performance by the supervisor. It is recommended that the employee and supervisor meet to discuss the employee's self-evaluation; that the supervisor then prepare a written review of the employee's performance, and then a final meeting is held to share the results of that review. It is appropriate of a new employee to receive quarterly reviews during the first year.

Both the employee and the supervisor are to sign the final written statement of the review . The employee is to receive a written copy of the review.

6.8.2 Salary Adjustments

Supervisors will recommend salary adjustments each budget year, taking into consideration: 1) the supervisor's summary from the evaluation review; 2) salary history; 3) general economic factors, e.g., cost of living adjustments; 4) and diocesan guidelines.

6.9 Voluntary Termination

Any employee who intends to resign is requested to give at least two weeks' notice in writing to their supervisor.

7.0 – Administration

7.1 Property Ownership And Improvements

7.1.1 Parishes

7.1.2 Missions

7.1.3 General

7.2 Insurance And The Use Of Buildings And Facilities

7.3 Capital Improvements

7.4 Program And Budget –the Diocese and the Congregations

7.5 Diocesan Program Assessment (DPA)

7.6 Finances and Planned Giving

7.7 Registers, Records and Reports

7.8 Diocesan Reports

7.9 Annual Meetings

7.1 Property Ownership And Improvements

7.1.1 Parishes

A parish Corporation holds legal title to all real property of the Parish, in trust for the Diocese of Oregon and the Protestant Episcopal Church in the United States of America. The Parish Corporation is responsible for the upkeep, maintenance and operation of all real and personal property owned by the parish, and all expenses incurred in these activities. The Parish may, subject to the provisions of Canons 5.3, 6.3 and 6.4, mortgage its property or incur other debt for which it is responsible.

The purchase, lease, mortgage or sale of real property, and certain modifications of existing improvements to real property, require consultation with, and approval of, the Board of Trustees, and written consent of the Bishop and the Standing Committee. Diocesan staff is available to assist with compliance with these requirements and with the scheduling of consultations with the Bishop, the Board of Trustees, and the Standing Committee.

7.1.2 Missions

A Mission congregation is responsible for all costs and expenses including mortgage payments and other debts; but since it is not incorporated, the Diocese of Oregon, through its Board of Trustees holds title to all mission property.

Consultation with the Diocese: The mission must notify the Bishop and the Board of Trustees seeking their counsel for proposals to acquire property, to expand or to make any major improvement to the existing property. Any unbudgeted expenditure that exceeds \$5,000, including memorial funds, must have approval of the Board of Trustees.

Mission congregations proposing new buildings, major changes to existing buildings, furniture and appointments of a permanent nature or the acquisition of a church organ must submit a proposal including plans and specifications to the Bishop and the Board of Trustees for approval.

7.1.3 General

Diocesan funds will not be allocated for financing buildings, remodeling, or the acquisition of facilities, fixtures or other property without the proper consultation.

Consultation with the Diocese: All congregations are required by diocesan canon to consult with the diocesan Commission on Art and Architecture before undertaking any additions or changes of a permanent nature to buildings or their contents.

7.2 Insurance And The Use Of Buildings And Facilities

Group Insurance Program:

Every mission congregation participates in the diocesan group insurance program on church property. The policy presently provided by Church Insurance Company, covers fire, theft, vandalism, comprehensive liability, director and officer liability, and a ten million dollar liability umbrella policy. Parish congregations are free to select a different carrier, but urged to use the same carrier, and to participate (as the mission congregations do) in the risk management plan with Church Insurance. Risk management provides a periodic audit and advice of experts with broad experience in the mitigation of exposure to fire, theft, and public safety hazards. Attention to risk management recommendations will enhance the welfare and safety of the congregation and may result in a reduction of the cost of insurance.

Current Inventory:

BACs and Vestries are responsible for a current inventory of all property of the congregation. It is useful to maintain a photographic record and permanently mark for identification all church silver, and other valuables. Inventory records should be stored in the same protected location as other church records (see Section 7.7 for record storage).

Annual Insurance Review:

Prudent practice suggests an annual review of all insurable items and a periodic appraisal of buildings and their contents, followed by consideration of appropriate coverage limits with the insurance carrier.

Use Permits:

The BAC or Vestry may find it appropriate to use a standard form such as the one in Appendix 8.2.5 for the use of property and facilities of the congregation by others, for a few hours, or for longer and regular periods. To avoid misunderstandings, confusion, conflict with other parish activity and possible exposure to liability claims, clear policy and documentation of such use is essential

Check List:

Use of a facilities check list will be helpful for BACs and Vestries as a starting point in developing appropriate policies in each congregation. It should include

- Use to be made of the property, including specifying rooms, equipment, number of occupants, parking etc.
- Schedule of days and hours of use, in order to avoid conflict with other activities and to allow rescheduling if necessary.
- Maintenance, cleanup, and any restrictions such as food, smoking, alcohol, or activity not appropriate for the space used.
- Utilities if significant (lights, hot water, heat and telephone. especially long distance calls.)
- Certificates of Insurance to cover additional liability exposure, naming the Diocese as additional insured. "Hold harmless clauses" are not very useful in case of an accident. A "Use Permit" is effective. (See Appendix 8.2.5)
- Reimbursement for the use of the property, cost of utilities and repair of equipment or facilities...when and how payment is made.
- Periodic Review and renewal (if indicated) should be clearly provided. "Open-ended" agreements should be avoided.
- Abide by the diocesan-approved Alcohol Use Policy (See Appendix 8.2.6)

Long Term Use:

Long term use should be by PERMIT or LICENSE with well-defined termination provisions and consequences of default. Oregon has stringent tenant/landlord laws which make it prudent to avoid terms such as "rent," "rental" and "lease." "Fees for cost reimbursement" is acceptable terminology.

Written confirmation of a permit or license, including acceptance by the user, should be on file in the parish records and if a mission congregation, a copy sent to the Board of Trustees for approval.

7.3 Capital Improvements

Prior to constructing a new building or remodeling existing buildings, all congregations must submit their plans to the Commission on Architecture and Allied Arts for review (see Canon 3.6). No diocesan funds may be allocated for such construction without first consulting the commission.

No parish may encumber by execution of a mortgage, trust deed or contract of purchase or real property, without first receiving the written consent of the Bishop and Standing Committee (see Canon 5.3.3). This requirement does not apply when refinancing an existing loan.

Title to the property of all missions is vested in the diocese, and written consent of the Bishop and the Board of Trustees must be secured prior to purchase, sale or otherwise encumbering mission property. (See Diocesan Canon 6.2.9.)

The above restrictions suggest that it is prudent for a vestry or BAC, before beginning any major design or financing process, to contact the diocesan office for guidance and the names of persons chairing the committee or commission appropriate for the specific project.

7.4 Program and Budget –the Diocese and the Congregations

Preparations and decisions about the annual diocesan Program and Budget involve the Departments, Commissions and Committees, the Program & Budget Committee (P&B), the Diocesan Council, the Convocations and the annual Convention of the Diocese. A structure is designed to provide opportunity for input from a variety of sources and concerns in the diocese and to ensure that the final product reflects a consensus of priorities by those using the programs and those funding them.

Preparing Goals and Budget Requests:

Each Department, Commission and Committee develops tentative goals and an estimate of the costs necessary to produce the results desired. These tentative plans are reviewed and the goals and costs are forwarded to P&B which collates the costs.

Often there are opportunities for Convocations to hear and respond to the priorities established by Council.

Drafts of the Budget:

During the summer, P&B works on preparing a draft of the budget for consideration by Council at the June meeting. Council needs to prepare a budget that is balanced; most often the requests far exceed the projected income. The first draft is shared with the program groups and convocations. A second reading is made at the September Council meeting.

The Proposed Program and Budget:

The budget that is approved by Council is sent on to the Convocations for discussion and to the convention for consideration. Delegates at the Diocesan Convention may amend the budget but the final version needs to balance. Any additions proposed must also indicate the source of revenue.

Congregation Program and Budget:

Each congregation's program and budget is developed after the Diocesan Convention and is presented to the Annual Meeting. (See Section 7.9 Annual Meetings) A mission congregation budget is subject to some special procedures related to mission, finances and property matters. (See Section 2.6.)

A parish congregation budget is developed and administered in accordance with its bylaws. (See Appendix 8.2.1 for a list of sources of typical bylaws).

7.5 Diocesan Program Assessment (DPA)

The program and budget of a mission or a parish is a reflection of the priorities, commitment and stewardship of that congregation. The PROGRAM typically includes: Worship, Education, Outreach, and Contributions. The BUDGET includes the costs of programs, the costs of personnel (including benefits), buildings, facilities, equipment, maintenance debt service and the Diocesan Program Assessment (DPA).

The DPA is the primary source of income to fund the operation of diocesan programs as established by the congregations in the process described above, including specifically, all administrative costs of the Diocese of Oregon, the Diocesan contribution to The Episcopal Church levied by the Executive Council, all Diocesan Mission projects, the expenses of Convention, the charges of the General Convention, and all charges incurred by the Diocese of Oregon. Additionally, the DPA is the secondary source of funding for the Bishop's salary after the Episcopal Endowment Fund, which is the primary source of funds for this purpose.

The Episcopal Church is, by its title, a church which understands the diocese to be the essential unit of the church. Every Episcopal congregation contributes to the diocesan (and national) church as a tangible indication of its support of the church beyond parochial bounds. The DPA is an important statement of trust between the congregations of the diocese and is a means of undertaking Christ's mission together. Much of the diocesan program is, in turn, of direct or indirect service to local congregations. The DPA, and the budget for its allocation is established annually by the Diocesan Convention. For more information see Canon 5.2.

Calculation of DPA:

The amount of DPA owed for any year shall be equal to the Applicable Rate times Assessable Income. The Applicable Rate shall equal 10 percent of the Base Amount plus 18 percent of Assessable Income in excess of the Base Amount. The Base Amount for any year shall equal \$30,000 plus a cost of living adjustment for changes after 2009. The cost of living adjustment shall be calculated by the same method as used in calculating cost of living adjustments to Diocesan Stipend, Housing and Utilities. Assessable Income equals the average of the following for the latest two years as reported by the congregation on the Parochial Report: Normal Operating Income (line A of the Parochial Report) less "Outreach from Operating Budget" (line 13 of the Parochial Report).

Remedies and Penalties for not Paying DPA

A Parish or Mission that has not paid its DPA for more than six consecutive months will be assessed costs for services provided by the Diocese, including but not limited to fees for insurance management and payroll services, travel expenses for Bishop visitations, and costs of Convention and Clergy Conferences that are supported by the DPA. Failure, for two consecutive years, to pay either the DPA or the costs assessed in lieu of the DPA, shall constitute evidence that the Parish or Mission is essentially defunct within Article 15 of the Constitution. (Please see Diocesan Canon 5.2, Sec 4 for additional information regarding this provision.)

Congregation Income Sources:

The congregation's income for program and budget typically includes open offerings, annual pledges, contributors (those who give, but do not pledge), special offerings, investments in the Diocesan Investment Fund, market interest from operating cash or dividends from securities owned by the congregation.

NOTE: Mission congregations should consult with the Diocesan Finance Officer about investment of mission funds or stock transfers. Stocks or bonds received by missions can be transferred or sold ONLY by the Board of Trustees of the diocese.

Stewardship:

The resources of a congregation (and by extension those available to the diocese) include the experience and ability of its members, and a portion of money given to them to manage, that is returned for God's work (a tithe). Stewardship includes an understanding of proportional giving, with the tithe as a goal, prudent management of all financial resources, the control of expenses, annual program and budget plans, proper accounting records/reports, prompt payment of the DPA and the appropriate care and use of the House of God.

User Fees:

Although user fees for the church building and facilities should be entered in the books of account by the treasurer, these fees should be set for an amount approximating the cost of operation and long-term replacement costs for that period and should not result in an income source. This practice serves to protect the nonprofit status of church buildings. Failure to establish appropriate fees may result in the congregation's operating budget carrying the expense. (See also Use of Facilities, Appendix 8.2.5.)

Fees for Services:

The church has no schedule of fees for services: pastoral or sacramental. However, any person may show appreciation or thanksgiving for such services by making an offering to the congregation's program or to the priest's Discretionary Fund. Checks should be made payable to the church rather than the priest.

7.6 Finances and Planned Giving

Canonical offerings are established by the canons of the diocese for a specific purpose and are to be sent promptly to the Treasurer of the diocese by check payable to the Diocese of Oregon, noting any special designation on the check. Please see Canon 5.4 for information regarding canonical offerings which include the Bishop's Visitation Offering, Theological Education Offering, Thanksgiving Day and Day of Pentecost Offerings.

A Priest's Discretionary Fund offering is designated by The Episcopal Church Canon, Title III.14.24 as the open offering on one Sunday each month. As an alternate, many congregations provide a line item in their operating budget for this purpose. (See also Section 5.2.9 and Appendix 8.4.)

Other Offerings not canonically required but traditionally forwarded through the diocese include the following:

The United Thank Offering has two gatherings each year which are forwarded to the Diocesan Finance Office.

The Good Friday Offering reflects the national support of the Episcopal Church for the work of the Anglican Communion in Jerusalem and the Middle East.

Many congregations use Birthday Thank Offerings for local programs or for camping scholarships.

Concern for world relief and development is expressed through the Episcopal Relief and Development Fund collections.

Planned giving through bequests in the distribution of an estate or for memorial gifts is an essential part of stewardship responsibility. The Diocesan Finance Officer has programs and materials helpful to encourage provision for the church in wills, bequests, endowments, etc. All congregations are urged to avail themselves of this resource in planning for the future.

Memorial Gifts:

A prudent Vestry/BAC develops policies for the review and acceptance of Memorial Gifts. Adequate funding for the installation, maintenance and review of the appropriateness for church use of a memorial should be confirmed by the governing body before the gift is accepted.

7.7 Registers, Records and Reports

Accuracy of Records:

The rector of a parish or the vicar of a mission is responsible for ensuring that the registers, records, reports and mailing list of the congregation are current and accurate. Should a vacancy occur, the registers and records must be given to the wardens and are their responsibility from the time the rector or vicar leaves a congregation until they are delivered to the new rector or vicar.

Accessibility of Records:

Registers and records of a parish or mission are open and available for inspection by the rector, vicar, the wardens, vestry or the BAC, the Bishop, or any person deputized by the Bishop, and are the property of the diocese to be deposited with the Bishop if the congregation is dissolved.

Content of Records:

The vicar or rector is required by Diocesan Canon 7.3 and The Episcopal Church Canon Title III.14.3 to have recorded in the Parish Register(s) all baptisms, confirmations, marriages, burials, and the names of all communicants of the mission or parish. Standard church registers with appropriate formats for the information required are available from Episcopal Church suppliers.

NOTE: In all registers that include names, it is important that the index of names and the page of record in the register be kept current. A record search will be facilitated if last names are recorded first in the index.

The Service Register is a record of all public and private church services. Each entry is signed by the officiating minister and includes the date, type of service, place, time, number attending, and the number of communions administered.

A Baptismal Register includes the name and gender of the person being baptized, the names of parents, sponsors, date and place of birth, date and place of baptism and signature of the officiant.

The Register of Confirmations records the name of the confirmand, date and place of birth, date and place of baptism, date and place of confirmation and the signatures of presenter and Bishop.

The Communicant Register lists the name of the communicant, date registered, and if registered by confirmation, transfer (from which parish), received, or restored. Also recorded are those leaving the congregation, indicating the reason for and date of removal from the register, and the date (and to which parish) if transferred out.

The Marriage Register records the date and place of the marriage ceremony, the names of the bride and groom, their ages, marital status, places of residence, parents' names and the signatures of the bride, groom, witnesses and the presiding Priest.

The Register of Burial records the name of the deceased, the last place of residence, the date and cause of death, the date and place of burial and the signature of the officiant.

7.8 Diocesan Reports

Annual Parochial Report:

It is the responsibility of the rector or the vicar to see to it that the annual parochial report is prepared and submitted to the diocese by March 1 as required by The Episcopal Church Canon Title I.6.2 and by Diocesan Canon 7.4. Canon I.6.2 requires the diocese to forward these annual reports to The Episcopal Church office by May 1st. Late submission of the reports means scheduling the data processing out of order, the extra cost of which will be passed back to the delinquent congregations. The annual parochial report is signed by the vicar or rector, a warden and the treasurer.

Required Report Data:

Information required in the parochial report includes statistics and financial data needed to determine an accurate view of the State of the Church (in the diocese and the nation). Most of the information is available in the service register, the parish register(s), and the treasurer's account books. Budget data is required for the coming year for clergy stipend, utility costs and housing allowance together with financial information from all organizations, endowments, trust accounts and bank accounts.

Information from the parochial report is also used to annually update the congregation ranges which are used to determine minimum compensation for full time clergy. (See Annual SHU chart on the diocesan website under Finance and Human Resources)

Financial Reviews:

The treasurer assists the vicar or rector by preparing the financial section of the annual report. A review of the treasurer's books need not be completed before submitting the report but the proposed date of the review and the name(s) of the reviewer(s) are to be noted in the report.

7.9 Annual Meetings

Each congregation of the diocese is required by Diocesan Canons (6.2 for a mission, 6.6 for a parish) to hold an annual meeting each year upon a day and hour determined by the vestry or BAC. Notice of the annual meeting, signed by the rector or vicar or by one of the wardens, is to be posted in a conspicuous place at a main entrance to the church at least one week before the date of the meeting.

The purpose of the meeting is to hear and act upon reports of the rector or vicar, the treasurer, the auditing committee, the church school, and the various commissions, guilds and other organizations; for the election of members of the vestry or BAC, for the election of delegates to Diocesan Convention, and for the transaction of such other business as may legally and canonically come before the meeting.

Voting at the annual meeting is limited to those present, and voting by proxy is not permitted. Legal voters of the parish or mission are given in Diocesan Canon 6.1.c.

The Presiding Officer at the annual meeting shall be the rector or vicar and if there is no rector or vicar, or in the case of absence or inability to act, one of the wardens shall preside. The clerk of the vestry or BAC shall be the clerk of the annual meeting and all meetings of the congregation. In the absence of the clerk, the meeting shall elect a clerk pro tempore.

8.0 Appendices

8.1 Diocesan Commissions, Committees, and Ministries

8.2 Reference Bylaws, Canons, And Forms

8.2.1 Bylaws

8.2.2 Reference Links to Diocesan Canons Relating to Missions and Parishes:

8.2.3 Reference Links to National Canons

8.2.4 Marriage:

8.2.5 Use of Facilities – Policies

8.2.6 Policy on The Use of Alcohol

8.3 Personnel Employment and Compensation

8.3.1 Covenants of Ministry

8.3.2a Covenant of Ministry – Full Stipend Rector (Sample)

8.3.2b Covenant of Ministry – Vicar (Sample)

8.3.3a Covenant of Ministry – Partial Stipend Priest-in-Charge (Sample)

8.3.3b Covenant of Ministry – Long Term Supply Priest (Sample)

8.3.4 Covenant of Ministry – Curate/Assistant/Associate Priest (Sample)

8.3.5 Covenant of Ministry – Interim

8.3.6 Covenant of Ministry – Deacon

8.3.7 Current Compensation Schedule and SHU Administrative Practices

8.3.8 Congregation Rankings

8.3.9 Continuing Education Allowance

8.3.10 Supply Clergy Compensation

8.3.11 Standard Diocesan Mileage Allowance

8.3.12 Mutual Ministry Guide

8.4 Discretionary Funds and Expense Accounts

8.5 Church Polity and History

8.5.1 English Church History

8.5.2 American Church History

8.1 Diocesan Commissions, Committees, and Ministries

There are three kinds of groups in the diocesan structure. Commissions are established by the Bishop or Diocesan Convention to assist in the conduct of specific diocesan functions. Committees are formed by Convention, the Bishop, the Council or almost any group that needs personnel or special expertise to accomplish certain tasks. Sometimes these groups are all called program groups.

There are other ministries and institutions sponsored by the diocese and other groups that are so specialized that they do not fit into any of the above categories.

For budget and planning purposes, these groups all fit within the four major strategic directions of the diocese: Congregational Life, Diocesan Mission, Leadership Development and Gospel Justice.

Commissions, committees, and ministries are grouped as follows to indicate that portion of the diocesan Program and Budget which lists the details of each strategic direction:

Congregational Life

Art and Architecture Commission	Consultants Network	Environmental Commission
Camp and Retreat Ministries	Convocations	Episcopal Church Women
Christian Education and Lifelong Formation Ministry	Cursillo	Fresh Start
Church Pension Fund	Daughters of the King	Insurance
Clergy Spouse Committee	Diaconate	Liturgy and Music Commission
Clergy Support	Diocesan Board of Trustees	Mission and Ministry Committee
Committee on Constitution and Canons	Diocesan Council	Program & Budget Committee
Congregational Vitality	Diverse Church Training	Safe Church Training
	DPA/'Congregational Relations	Standing Committee of the Diocese
	Education for Ministry	Youth Ministries Commission

Diocesan Mission

Administrative Ministry	Episcopal Campus Ministries	Ministry of Lifelong Christian Formation
Communications Ministry	Finance Committee	Personnel Committee
Diocesan Convention	General Convention	Province VIII Program
Disaster Preparedness	Latino Commission	Retired Clergy
Ecumenical Ministries of Oregon		

Leadership Development

(The) Academy for Formation and Mission	Commission on Ministry	Jubilee Ministries
Clergy Conferences	Fresh Start for Clergy and Congregations	Latino Ministry
		Parish Nurses/Health Ministries

Gospel Justice

Church Periodical Club	Committee on Israel and Palestine	Peace and Justice Commission
Commission on Prison Ministries	Episcopal Peace Fellowship	Recovery Commission
Commission on Poverty & Homelessness	Episcopal Public Policy Network	United Thank Offering
Commission to End Racism	Episcopal Relief & Development	William Temple House
Companion Diocese	Global Mission	
	Sustainable Development Goals	

Phone numbers and addresses for the conveners of all the program groups are published quarterly in the Directory of the Diocese of Oregon which is distributed to all clergy and church offices in PDF format by email. Printed copies can be obtained by emailing Tracy Esquerra at tracye@diocese-oregon.org or calling 503.636.5613 (toll-free - 888.346.2373) or by writing to 11800 SW Military Lane, Portland, OR 97219-8436.

Other Diocesan Ministries and Institutions

Bishop's Close / Diocesan Offices Center for Community Counseling (Eugene) Diocese of Oregon	Episcopal Bishop of Oregon Foundation Good Samaritan Hospital (Corvallis) Legacy Good Samaritan Hospital (Portland)	Oregon Episcopal Schools (Portland) Samaritan Village (Corvallis) Samaritan Health Services (Corvallis)
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8.2 Reference Bylaws, Canons, And Forms

8.2.1 Bylaws

Each parish and mission in the diocese is required to operate under the Constitution and Canons of the diocese and have bylaws designed for that local congregation. Bylaws can be amended and revised and are often more complex for large parishes than for small ones, and again different for missions. This manual therefore does not attempt to include examples of bylaws but rather to suggest several parishes and missions which will make their bylaws available for vestries and BACs that may wish to review or up-date their own documents.

Parish Bylaws:

Church of the Good Samaritan, 333 NW 35th St., Corvallis OR 97330

St. Luke the Physician, 120 SW Towle, Gresham, OR 97080

St. Stephen's Parish, 1432 SW 13th Ave., Portland, OR 97201

Church of the Resurrection, 3925 Hilyard St., Eugene, OR 97405

Missions Bylaws:

St. Andrew's, PO Box 15, Florence, OR 97439

St. Stephen's, PO Box 1014, Newport, OR 97365

8.2.2 Reference Links to Diocesan Canons Relating to Missions and Parishes:

The Constitution and Canons of the Diocese of Oregon may be found on the Diocesan website.

Canon 6.1 and 6.2 relate specifically to Missions and includes the following information:

6.1 The Mission Organization

6.2 Mission Governance

Provisions regarding the Annual Meeting

Composition and Responsibilities of Bishop's Advisory Committees (BAC)

Election and Duties of Wardens

Duties of the Clerk

Duties of the Treasurer

Canon 6.3 through 6.12, plus 6.14 relate specifically to Parishes and includes the following information:

6.3 Parish Formation

6.4 Incorporation of Parishes

6.5 Parish Bylaws

6.6 Parish Meetings

6.7 Parish Vestries

6.8 Duties of Wardens

6.9 Duties of Officers

6.10 Filling of Clerical Vacancies

6.11 Audit of Accounts

6.12 Determination of Controversies

Canon 6.13 refers to both Missions and Parishes and addresses Changing the Name of a Parish or Mission.

8.2.3 Reference Links to National Canons

The Constitution and Canons of the Episcopal Church may be found on The Episcopal Church website.

Title I of the National Church canons is concerned with Organization and Administration.

Title II of the National Church canons is concerned with Worship.

Title III of the National Church canons is concerned with Ministry, including

- The Ministry of all Baptized Persons
- The Commission on Ministry
- Licensed Ministries

8.2.4 Marriage:

Guidelines to Request Consultation and Consent (Title I Canon 19) are found on the Diocesan website in the Resources section.

8.2.5 Use of Facilities – Policies

Each parish or mission shall have in place, a written policy, approved by its Vestry or BAC, concerning the use of Church facilities by members of the Congregation, and by outside groups. Each Church should develop one for its own individual conditions and needs. Be aware that if a charge for use is made, the Church must be prepared to demonstrate that the charge covers only expenses, or its IRS tax exempt status may be in jeopardy.

Please Note: Each parish or mission, having developed a use of facilities policy, also needs a procedure to implement that policy.

The Facilities Use Policy, approved by the Diocesan Chancellors follows on the next page.

Facility Usage Policy

When renting our space, we must be very careful to rent it properly to avoid earning “unrelated business income” (UBI) and endangering the Church’s exemption from both property and income taxes.

1. Single-use users can be either non-profit or for-profit
 - a. Facility Use Agreement
 - b. Proof of Liability Insurance naming Church as “other insured.”
2. Ongoing-users (non-profits)
 - a. Facility Use Agreement or other Agreement (which MUST be either drafted by or reviewed by the Chancellor/Vice-Chancellor before it is signed)
 - b. Proof of Liability Insurance naming Church as “other insured.”
 - c. Proof of their tax exemption.
3. On-going users (for-profit): *Risk of Unrelated Business Income*
 - a. Allow them use of the building for free (they may make a contribution, but Church may not require it nor specify amount).
 - i. Facility Use Agreement
 - ii. Proof of Liability Insurance naming Church as “other insured.”
 - b. We don’t allow them to use the building.
 - c. It is possible to enter into paid contracts with for-profit users as long as those contracts are crafted to demonstrate the user as part of the mission and ministry of the church. This requires careful consideration and MUST be done with legal counsel.
 - i. Contract (which MUST be either drafted by or reviewed by the Chancellor/Vice-Chancellor before it is signed)
 - ii. Proof of Liability Insurance naming Church as “other insured.”

8.2.6 Policy on The Use of Alcohol

Oregon Diocesan Policy on Use of Alcohol (approved by Diocesan Council March 5, 2016)

These guidelines recognize the long-standing tradition of appropriate and moderate use of beverages containing alcohol in the Episcopal Church, and our Biblical traditions of wine usage in our ancient church, but also recognize that alcoholic beverages are mood-altering substances affecting behavior, can be dangerously addictive when usage gets uncontrollable, and all aspects of alcohol serving are subject to governmental laws and regulations.

- 1) The church must provide a safe and welcoming environment for all people, including people in recovery from addiction to alcohol.
- 2) Congregations and congregational leaders should be thoroughly familiar with all applicable federal, state and local laws and regulations concerning alcoholic beverages and such laws and regulations shall be scrupulously followed.
- 3) Some congregations may decide not to serve alcohol at events or gatherings. Others may decide to permit a limited use of alcoholic beverages at church-sponsored events. Both can be appropriate if conducted with restraint and consideration.
- 4) When alcohol is serviced, it must be monitored and those showing signs of intoxication must not be served. Whenever alcohol is served, the rector, vicar, or priest-in-charge must appoint an experienced member of the congregation to oversee its serving.
- 5) Serving alcoholic beverages at congregational events where minors are present is strongly discouraged. If minors are present, alcohol must be served at a separate station that is monitored at all time to prevent underage drinking.
- 6) Alcoholic and non-alcoholic beverages must be clearly labeled as such. Food prepared with alcohol does not need to be labeled provided the alcohol is completely evaporated by the cooking process; however, it is recommended that even in this case the use of alcohol in cooking be noted on a label.
- 7) Whenever alcohol is served, appealing non-alcoholic alternatives must always be offered with equal prominence and accessibility.
- 8) The serving of alcoholic beverages at church events should not be publicized as an attraction of the event, e.g. “wine and cheese reception,” “cocktail party,” and “beer and wine tasting.”
- 9) Those in charge of ministries or events organized and managed by congregations, inside or outside of church premises, will make certain that alcohol consumption is not the focus of the event and that drinking alcohol is not an exclusively normative activity.
- 10) Food must be served when alcohol is present.
- 11) Church groups or outside organizations sponsoring the activity or event at which alcoholic beverages are served within church premises must have permission from the clergy or vestry/BAC, and must be familiar with and scrupulously follow all applicable federal, state and local laws and regulations concerning alcoholic beverages. Such groups or organizations must also assume specific responsibility in writing for those persons who might become intoxicated and must provide alternative transportation for anyone whose capacity to drive may be impaired. Consulting with liability insurance carriers is advised, in order to assure that any liability incurred by use of alcohol is fully covered.
- 12) Alcoholic beverages shall not be served when the business of the Church is being discussed or acted upon.
- 13) Clergy shall consecrate an appropriate amount of wine when celebrating the Eucharist and perform ablutions in a way that does not foster misuse.
- 14) Clergy are urged to consider providing non-alcoholic wine as well as regular wine in the serving of the sacrament at Holy Communion.

8.3 Personnel Employment and Compensation

8.3.1 Covenants of Ministry

Covenants of Ministry (also called Letters of Agreement) are required for every clergy person working regular hours on staff in a congregation or for the diocesan office; whether stipendiary or non-stipendiary.

A Covenant of Ministry must include:

Preamble – indicating the name of the congregation and the clergy person and/or other parties involved, the effective dates of the formal relationship, and any other understandings about the agreement.

Position Description – Stating the primary duties of the clergy person as mutually understood by the clergy person and Vestry/BAC, other complimentary duties assumed by the Vestry/BAC and congregation, supervisory relationship with other clergy and lay paid staff and volunteer staff, and expectations for clergy participation in diocesan and community life.

Compensation – Amount of Stipend, Housing and Utilities (SHU) determined by the congregation's placement in the SHU chart, indication that a portion of the SHU will be paid in the form of non-taxable housing allowance approved annually by vestry/BAC, and what the pay periods will be.

Benefits – Spell out the terms of the Pension, Group Medical Insurance, Life Insurance, Dental and any other insurance, automobile and other expenses.

Work Week, Vacation and Leaves – Typical work schedule and days off, amount of vacation including number of work days and Sundays, national holidays to be taken not to interfere with worship on major holy days, continuing education leave of up to 10 days per year with a budgeted amount to cover the costs, sick leave, sabbatical leave plan, and any other leaves.

Use of Buildings and Office Space – stating the clergy person's authority to grant use of buildings to individuals and groups within the limits of the congregation's Building Use Policy with any use of more than a single occurrence subject to approval by vestry/BAC, and that office space is given for the clergy person containing appropriate telephone and computer connections.

Ministry Review – annual mutual ministry review at agreed upon time and date when this covenant will be reviewed.

Termination – state that this happens by mutual consent of the clergy person and vestry/BAC, or by decision of the Bishop.

Other Arrangements – if any

Dated Signatures – of the Clergy Person, Senior Warden of the Congregation, and the Bishop.

8.3.2a Covenant of Ministry – Full Stipend Rector (Sample)

RECTOR COVENANT OF MINISTRY Between the Wardens and Vestry of

_____ and
the Rev. _____

Who has been elected Rector, with the understanding that this tenure is to continue until dissolved by mutual consent or by arbitration and decision as provided in the relevant Canons of the Diocese of Oregon and of the Episcopal Church. The Vestry and the Congregation by this letter confirm the following terms of continuing full time employment as Rector of _____, in _____ OR beginning _____, _____.

DUTIES the Rector and Vestry have discussed and agreed upon include the following:

- Provide leadership to the parish as priest and teacher, sharing in the councils of this congregation and of the whole Church, in communion with our Bishop.
- Proclaim the Gospel by word and action, informed at all times by the Holy Scriptures, the Book of Common Prayer and the Constitution and Canons of the General Convention and Diocese of Oregon.
- Love and Serve Christ's people, nourishing them and strengthening them to glorify God in this life and in the life to come.

The RECTOR is responsible for a wide variety of tasks. S/He will need to delegate much of the actual work to others: assisting clergy, deacons, wardens and other members of the vestry and additional lay persons. Some examples of the work of the rector are as follows:

WORSHIP. The preaching, use of music, participation of clergy and lay persons and all other elements of the conduct of scheduled Holy Eucharist services each week which include _____ on Sundays and _____ on weekdays, other weekly services and all other services on holy days and other special occasions.

EDUCATION. For all children, youth and adults in the congregation, the orientation of new people to the parish and the faith; preparation of adults and sponsors for baptism and for the preparing for confirmation, reception or affirmation of baptismal vows.

PASTORAL CARE and COUNSELING. For all those in need of such care and to provide referrals to professional counselors as needed; especially those who are sick, shut-in, those in mental or emotional distress, those preparing for marriage, those about to be divorced or with other special family or individual needs.

LAY MINISTRIES. As identified in the Parish Profile and as amended through Mutual Ministry Reviews with the Vestry and the Congregation.

DIOCESAN ASSIGNMENTS. As decided in consultation with the Bishop and Vestry and in regard to the Diocesan structure.

BUILDING and FACILITIES. Safety and maintenance of the facilities, schedule of use, adherence to the Building Use Policies established by the Vestry and all relevant laws and codes.

PARISH ADMINISTRATION. The finances and stewardship of the parish, management of staff and volunteers and management of the assets of the parish with the Wardens, the Treasurer and others as assigned.

COMPENSATION

Beginning _____, 20____, _____ will pay the Rector Stipend-Housing-Utilities (SHU) compensation in the amount of \$ _____ annually in accordance with Diocesan Policy. Compensation is paid once per month on the last working day fo the month. At the beginning of this ministry and prio to the beginning of each year, the Rector will designate and the Vestry must approve the portion of this compensation to be paid as non-taxable housing allowance.

ADDITIONAL ALLOWANCES

The annual budget of the parish will include an amount provided for continuing education of \$ _____. This is in accordance with the amount recommended by Diocesan policy.

A discretionary fund under control of the Rector or Rector’s designees will be established from the loose offering received on the first Sunday of each month and gifts given to the Rector for the purposes of the discretionary fund as defined in the policies and procedures of _____ Parish.

A business expense reimbursement will be provided for appropriately documented expenses up to the amount approved in the annual budget of the parish. Any such expense above the budgeted amount will be treated as a charitable contribution.

An automobile allowance will be provided for church related travel at the current rate established by the Diocese.

Moving expenses will be provided in the amount of \$ _____.

Cell Phone reimbursement will be provided in the amount of \$ _____ per month.

BENEFITS

The Vestry shall pay the following benefits:

Church Pension Fund Assessment (currently 18%) on the sum of the Rector’s total annual cash salary (including housing and utilities allowance if any).

Diocesan Group Medical and Dental Insurance premiums. Note: if equivalent or better insurance is provided through the employment of the Rector’s spouse or partner, the Rector may sign a waiver to forgo the Diocesan insurance coverage. If at any time the Rector revokes the waiver, the Vestry will provide the Diocesan Group Medical and Dental Insurance plan.

Current Diocesan Group Life Insurance Premium (\$40,000 death benefit).

Worker’s Compensation Insurance, as provided by State Law.

TIMES of WORK, VACATION and LEAVE

The scheduled work week is five out of seven days including Sundays and must provide time not only for activity directed to the parish and its well-being, but also on behalf of the Diocese and community. This work week is usually measured as ten to twelve units of mornings, afternoons, or evenings., in various combinations reflecting the demands of this ministry. In general, no more than three evenings per week are expected. Rector is expected to save at least one continuous 24-hour period each week solely for his/her own personal use.

Vacation and leave with full compensation includes the following:

- One month (defined as 22 work days) annual vacation, which shall include five Sundays. No more than seven days and one Sunday may be carried forward to succeeding years.
- Two weeks (defined as 10 work days) of continuing education leave, as part of regular work days with no carry over to succeeding years.
- Two weeks (defined as 10 work days) paid sick leave available annually. These can be accumulated to no more than a total of 30 days.
- National holidays as set in _____ employee handbook, to be taken so not to interfere with worship on major Holy days.
- Three months of sabbatical time after each five years of service. Sabbatical requests shall be made in writing to the Vestry detailing timeline, specific plans, costs and goals to ensure benefits to the Parish as well as to the Rector. Following Vestry approval, sabbatical arrangements shall be made in full consultation with the Vestry. Request for sabbatical as a conclusion to the Rector's tenure will not be considered appropriate.

USE OF BUILDINGS

In addition to the use and control of the Parish buildings and grounds for the discharge of the duties of the Rector's office, as provided by Canon Law, the Rector has the authority to grant use of the building to individuals or groups from outside of the Parish within the limits of the Building Use Policy of _____. Any use of more than a single occurrence shall be subject to prior approval by the Vestry.

OFFICE SPACE

Office space will be provided for Rector's exclusive use. It is to be furnished with a telephone extension connected to the Parish telephone system, computer, printer and internet connection and appropriate furnishings.

MINISTRY REVIEW

An annual review of the total ministry of _____ is an important element on the life of the Parish. A mutual ministry review process will be followed to ensure that clear Parish goals are established for the coming year, the Rector, Wardens and Vestry understand their individual and mutual responsibilities in support of parish goals, there are opportunities to assess how well responsibilities are being fulfilled to each other and to these shared ministries, areas of conflict or disappointment are isolated and solutions are designed to enhance growth. A record of the review will be kept and portions deemed appropriate will be published to the Parish. The annual review will be in _____ or as close to that time as is practically possible.

OTHER AGREEMENTS

In the event of the Rector's death, the Vestry agrees to continue payment of the Rector's cash salary, including housing allowance, and appropriate Medical Insurance to the Rector's surviving direct dependents for a period of three months.

Rector Date

Senior Warden Date

Bishop Date

8.3.2b Covenant of Ministry – Vicar (Sample)

Letter of Agreement

Between the Wardens and Bishop's Advisory Committee of

_____ has been called as Vicar of _____ pursuant to the terms and conditions listed below and the Constitution and Canons of the Episcopal Church and the Episcopal Diocese of Oregon. The terms will begin _____.

DUTIES:

Provide Leadership to the parish as Vicar and teacher, sharing in the councils of this congregation and of the whole Church, in communion with our Bishop.

Proclaim the Gospel by word and action, informed at all times by the Holy Scriptures, the Book of Common Prayer and the Constitution and Canons of the Episcopal Church and the Diocese of Oregon.

Love and Serve Christ's People, nourish them, and strengthen them to glorify God in this life and the life to come.

Delegation of Duties:

The Vicar is responsible for a wide variety of tasks. _____ recognizes that you will need to delegate much of the actual work to your colleagues in ministry, lay and ordained, as you choose and where appropriate. Examples of these tasks are:

Worship: Oversight of all worship services, preaching, use of music, participation of laypersons and clergy, and all other elements of worship in the church.

Education: children, youth, and adults; orientation of newcomers to the Episcopal Church; preparation of adults and sponsors for baptism, confirmation, reception or affirmation.

Pastoral Care and Counseling: for all member of the church to the extent qualified by education and certification, referring to qualified counselors or therapists as needed. To conduct pre-marriage counseling.

Lay Ministry: oversight of ministries

Outreach Ministries: oversight of outreach programs.

Community participation: join with the congregation in the life of the communities we serve.

Diocesan Assignments: in consultation with the Bishop and BAC

Building and Facilities: adherence to Building Use Policies and all relevant laws and codes.

Parish Administration: oversight of finances and stewardship of church, staff, volunteers, management of assets in collaboration with Wardens, Treasurer, Finance Committee and BAC.

COMPENSATION:

Beginning _____, _____ will pay Stipend-Housing-Utilities (SHU) compensation in the amount of \$ _____ annually, based on _____ time, in accordance with Diocesan Policy.

Compensation is paid once per month on the last workday of the month.

At the beginning of this ministry, and prior to the beginning of each year, the Vicar will designate, and the BAC must approve, the portion of this compensation to be paid as non-taxable housing allowance.

ADDITIONAL ALLOWANCES:

Continuing Education: An allowance will be paid to you or on your behalf toward expenses incurred for continuing education. The annual continuing education allowance shall be the amount recommended by the Diocese.

Discretionary Fund: provided for your use in accordance with the policies and procedures of the Episcopal Church, the Diocese of Oregon, and _____ Episcopal Church of _____.

Business Expenses: provided as per the yearly budget of the church.

Automobile allowance: will be provided for church related travel at the current IRS mileage rate or church related travel.

Moving expenses are _____.

BENEFITS:

The BAC shall pay the following benefits:

Church Pension Fund Assessment (currently 18%) on the sum of the Vicar’s total annual cash salary (including Housing and Utilities Allowance)

Diocesan Group Medical and Dental Insurance Premiums.

Current Diocesan Group Life Insurance Premium (\$40,000 death benefits)

Worker’s Compensation Insurance, as provide by State Law.

Annual Total Salary: _____

Percent time position: _____%

WAGES

Amounts

Per Year

Per Month

Salary

Housing/Utilities

TOTAL WAGES

BENEFITS

Amounts

Per Year

Per Month

18% Pension Fund

Health Insurance

Life Insurance

Dental Insurance

Auto Mileage record turned in monthly for reimbursement using the current IRA mileage rate for church-related travel.

TOTAL BENEFITS

TOTAL PACKAGE

Workman's Compensation

Times of work, vacation, and leave:

- i. _____ off per week
- ii. Vacation shall be _____ weeks per year not to exceed _____ Sundays
- iii. National holidays- to be taken not to interfere with worship for major occasions
- iv. _____ week(s) off for continuing education leave
- v. _____ weeks(s) off for sick leave, other leaves, and Diocesan activities

Supply Clergy shall be provided by _____ for Sundays of vacation

USE OF BUILDINGS: In addition to the use and control of the Church and Parish buildings for the discharge of the duties of your office, as provided by Canon Law, you have the authority to grant use of the buildings to individuals or groups from outside the parish, subject to Policy for Use of Facilities established by the BAC.

OFFICE: An office is provided for your use as the Vicar's Office. It includes a telephone and WiFi. The church's computer is available for your use.

MINISTRY REVIEW: An annual review of the total ministry of _____ church will be developed in consultation with Vicar and BAC and those serving in various ministries.

The Diocese will provide Fresh Start group gatherings for you to be a part of the first two years of your employment and a Clergy Mentor to you for the first year of your employment. Schedule and content of meetings will be developed in consultation with the Fresh Start Coordinator, the mentor and the Vicar.

TERMINATION -by mutual consent of Vicar and BAC, or by decision of the Bishop, as provided in the relevant Canons of the Diocese of Oregon and of the Episcopal Church.

8.3.3a Covenant of Ministry – Partial Stipend Priest-in-Charge (Sample)

COVENANT OF MINISTRY

between

_____ Church

and

The Rev. _____

who has been called by the Vestry/BAC as Part-stipend Priest-in-Charge.

The term of the Priest-in-Charge will be for a period of _____ years/months, unless earlier dissolved by mutual consent or by decision of the Diocesan Bishop. The term of this covenant becomes effective on _____, the start date.

At the conclusion of the _____ year/month period, the Vestry/BAC and the Priest-in-Charge will make a determination on whether or not to change the position from Priest-in-Charge to Rector/Vicar and enter into a new contract with our Bishop's approval.

Position Description

The Part-stipend Priest-in-Charge has full authority of Rector/Vicar, except tenure, and shall lead _____ Church as pastor, priest and teacher, sharing in the councils of this congregation and of the whole church, in communion with our Bishop. The person in this position will also participate as a member of the diocesan community through regular attendance at diocesan functions.

General Duties and Responsibilities

Leads the congregation in worship:

- Maintains a regular schedule of worship services, leading Sunday worship, administering the sacraments and preaching
- Leads special services at needed (Baptisms, Funerals, Weddings, Christmas, Epiphany, Ash Wednesday, Maundy Thursday, Good Friday, etc.)
- Works collaboratively with congregational members who provide support for worship services (altar guild, musicians, lectors, lay eucharistic ministers, etc.)

Works collaboratively with the Vestry/BAC:

- Oversee work of the vestry/BAC
- Set agenda for vestry/BAC meetings with the Senior Warden and Junior Warden
- Work with Treasurer on all financial matters of the congregation
- Participates in an annual Mutual Ministry Review (MMR) with the vestry/BAC

Oversees the church administration:

- Manages and supports paid staff and volunteers
- Attends committee meetings as appropriate
- Maintains regular office hours

Empowers lay leadership within the congregation:

- Greets visitors and provide for potential members involvement
- “Builds up the Body of Christ” in all areas of parish life by presence, word and example.
- Empowers congregation to discover and use their gifts and skills for ministry
- Supports lay leadership in all ministry areas
- Provides leadership in vision, mission and strategic goals of the congregation in light of the larger church and in national and global context

Provides for and oversees Christian Formation for the congregation:

- Children
- Youth
- Adult
- New Members
- Lay ministry trainings
- Baptism and Confirmation preparation

Provides pastoral care:

- Work with pastoral care team to provide spiritual and personal care to congregants as appropriate
- Hospital visitations
- Home and nursing home visits
- Marriage counseling
- Counseling and referral in crisis situations
- Utilize a discretionary fund for those in need

Participates in convocation and diocesan activities:

- Attends Fresh Start
- Meets regularly with a mentor the first year of tenure
- Attends convocation meetings
- Active in the councils of the Diocese of Oregon
- Attends clergy conferences and Diocesan Convention

Works with the larger community:

- Joins and becomes active in at least one neighborhood/community group
- Seeks opportunities to work with other denominational groups in collaborative ministry
- Takes advantage of opportunities to evangelize in the neighborhood/community

Compensation

Salary according to the Stipend, Housing and Utilities (SHU) diocesan standard

\$ _____

Salary will be in the form of a monthly payment on the last working day of the month.

The Priest-in-Charge and the Vestry/BAC will determine what amount of the SHU is for housing and that amount will be noted in the Vestry/BAC minutes at the beginning of the contract and annually thereafter.

Benefits

Pension: 18% of salary

Group Medical Insurance _____

Life Insurance _____

Continuing Education _____

Automobile and other expenses: business mileage will be reimbursed at the IRS mileage rate, other approved business related expenses with receipts will be reimbursed monthly

Phone _____

Work Week, Vacation and Leaves

Work week:

The part-stipend priest will work approximately _____ hours per week based on a full-stipend professional work week of 40-50 hours per week.

The priest-in-charge and the vestry/BAC will work out the days and times of these hours. It is understood that Priest-in-Charge positions sometimes require unexpected and unplanned commitments in any given week. It is expected that the Priest-in-Charge will reserve at least one continuous 24 hour period each week solely for his or her personal use.

Vacation:

Four weeks of vacation with pay will be provided. For the Sundays that the Priest-in-Charge is on vacation, it is his or her responsibility to secure a supply priest to celebrate the Eucharist and preach. Vacation time and days off are a matter of mutual agreement between the Vestry/BAC and the Priest-in-Charge.

Holidays:

The following holidays with pay are to be taken so as not to interfere with worship for major occasions: New Years Day, MLK Day, President’s Day, Memorial Day, Independence Day, Labor Day, Thanksgiving, the day after Christmas Day. In the event that the holiday would interfere with a major occasion, the holiday should be observed in the next scheduled workday.

Continuing Education:

Up to ___ days of paid continuing education leave per year is available as part of regular salary with the prior approval of the Vestry/BAC.

Sick Leave:

Up to ___ days of sick leave are available per year. This is not transferred or accumulated year to year.

Other Leaves:

___ weeks of paid paternity or maternity leave will be available if needed.

Other leaves of absence would be decided between the Vestry/BAC and Priest-in-Charge if needed.

Review

An annual Mutual Ministry Review will be planned between the Priest-in-Charge and the Vestry/BAC using an outside facilitator. Other or more frequent review dates may be established if mutually agreed upon.

Termination

Termination of this agreement before the ending date may occur by mutual consent of the Priest-in-Charge and the Vestry/BAC, or by decision of the Bishop, as provided in the relevant Canons of the Diocese of Oregon and of the Episcopal Church. Meetings three months prior to the ending date of this contract or earlier will be convened by vestry/BAC and Priest-in-Charge to decide if a new covenant is desired to be put in place or not.

Priest in Charge Date

Senior Warden Date

Bishop Date

8.3.3b Covenant of Ministry – Long-Term Supply Priest (Sample)

A LETTER OF AGREEMENT

between

_____ of _____, Oregon

And

The Rev. _____

who has been hired as Long-Term Supply Priest with the understanding that this tenure shall continue for a one year renewable term, from _____ until _____ or until dissolved by mutual consent or upon 30 days written notice by either party. Renegotiations of terms in the agreement by mutual consent are allowed at any time during the tenure.

SECTION A. RESPONSIBILITIES

Bishop Advisory Committee Responsibilities

All ministries other than those reserved to ordained leadership (such as administering sacraments) are understood as mutual ministries of the laity of the parish and the Long-Term Supply Priest. The BAC shall lead the laity to support and cooperate with _____ in pursuit of the congregational goals and in the performance of the development tasks of the transition period.

The BAC will see that _____ is properly supported, personally and organizationally as well as in the financial obligations to the Long-Term Supply Priest position.

Long-Term Supply Priest Responsibilities

The Long-Term Supply Priest represents and extends the ministry which is the Bishop's pastoral and canonical responsibility for congregations in leadership transition. The Long-Term Supply Priest shall lead the congregation, temporarily, as priest and teacher, sharing in the councils of this congregation.

This priest shall:

- Work with the BAC and lay leaders to maintain the regular schedule of worship services and preaching, education, pastoral-care, and pastoral offices (weddings, funerals, and baptisms), calling upon the sick and shut-ins, visiting newcomers, and keeping Parish records.
- Supervise any and all congregational staff in the exercise of their responsibilities and ministries, through attendance at scheduled meetings or on an individual basis.
- Support the BAC in its responsibilities and attend any BAC meetings, as needed.
- Meet with the Senior and Junior Warden on a monthly basis to discuss the state of the congregation.
- Deal with internal conflicts and help to heal any divisions within the congregation.
- Advise, counsel or consult with individuals or groups within the congregation, as needed.
- Provide liturgical education and other adult education, such as Bible Study or Lenten Study.
- Be exempt from attending any Diocesan meetings, unless directed to do so by the Bishop.
- Provide Office hours by appointment only and as needed.

SECTION B. TIMES OF WORK

- (Named priest)'s scheduled work week is to be mutually agreed upon and is to include Sunday morning services and Wednesday morning services.
- (Named priest) will be allowed time off for any planned vacation or to fulfill any Continuing Education requirements.
- (Named priest) may use the Church Office, telephone and office equipment, as needed.

SECTION C. COMPENSATION

- (Named Priest)'s cash salary, based on Diocesan guidelines, are as follows:
 - \$200 for 2 Sunday services with sermon
 - \$150 for 1 Sunday service with sermon
 - \$100 for 1 mid-week service without sermon
 - \$___ per month to cover all incidentals
 - Travels expenses including mileage, out-of-pocket costs for parking and tolls
- Payment will be made by the last day of each month.
- These fees are renegotiable at any time by either party.

Supplemental Compensation

- Long-Term Supply Priest shall not charge fees for performing any rites of the Church (for example, baptisms, marriage, funerals) at (Named Church) but may receive donations, fees, or honoraria for professional services (sacramental or non-sacramental) performed on personal time on site.
- Long-Term Supply Priest shall not be paid a Discretionary Fund. However, if an extraordinary need arises, the Senior Warden, together with Priest, shall have access to funds for a reasonable expense normally attributed to a canonical Discretionary Fund.

SECTION D. USE OF THE BUILDING

It is understood the general pattern of building use follow by the last vicar shall be maintained, unless there is a specific action of the BAC to the contrary. Priest shall have the right to grant use of the buildings to individuals or groups outside the parish under the guidelines and approval of the BAC.

SECTION E. MUTUAL MINISTRY REVIEW

At four month intervals (March, June, September, December) the BAC and the Long-Term Supply Priest will initiate a discussion to:

- Provide Priest, the Wardens and BAC members opportunity to assess how well they are fulfilling their responsibilities to each other and the ministries they share.

- Evaluate progress on developmental tasks, establish and adjust goals for the parish during the transitional period.
- Plan for the healthy closure of the transitional ministry and prepare for the coming of the new vicar.
- Isolate areas of conflict or disappointment which have not received adequate attention and may be affecting mutual ministry adversely.
- Clarify expectations of all parties to help put any future conflicts in manageable form.

OTHER AGREEMENTS

- Long-Term Supply Priest shall continue duties in the parish beginning _____, 20__
- All pay shall become effective on _____, 20__
- This Letter of Agreement shall be made part of the minutes of the next BAC meeting following its signing and copies given to all current members of the BAC, the Priest, and the Diocese of Oregon.
- This Letter of Agreement may be revised only by mutual agreement. All terms are negotiable by either party at any time this agreement is in effect.

Date _____

The Rt. Rev. Michael Hanley, Bishop
Diocese of Oregon

Date _____

The Rev. -----, Long-Term Supply Priest

Date _____

----- . Senior Warden

8.3.4 Covenant of Ministry – Curate/Assistant/Associate Priest (Sample)

CURATE/ ASSISTANT/ ASSOCIATE COVENANT OF MINISTRY

between the Rector, Wardens and Vestry of

_____ and _____

Who has been called as Curate/Assistant/Associate with the understanding that this tenure is to continue for ___ years unless earlier dissolved by mutual consent or upon ninety (90) days' notice of either party, which notice may be given for any legal reason. This letter of agreement is effective _____.

This agreement ends on _____ and must be renegotiated at that time to continue this agreement. The Vestry and the Congregation by this letter confirm the following terms of your full-time employment as Curate of _____ in _____.

DUTIES

You and the Rector have discussed and agreed upon general duties that include the following:

Provide leadership to the parish as priest and teacher, sharing in the counsel of this congregation and of the whole Church, in communion with our Bishop.

Proclaim the Gospel, by word and action, informed at all times by the Holy Scriptures, the Book of Common Prayer and the Constitution and Canons of the General Convention and this Diocese.

Love and serve Christ's people, nourish them, and strengthen them to glorify God in this life and in the life to come.

As Curate/Assistant/Associate, you are responsible for a wide variety of tasks as assigned by the Rector. Areas of focus will be revised periodically to assure experience in all areas of church life.

Some typical examples of your responsibilities are:

- A. **Worship:** Participation in the Sunday liturgies and mid-week services at the direction of the rector, which would include regularly preaching on assigned Sundays.
- B. **Education and Formation:** Working with the leadership team of the youth ministries and Sunday School.
- C. **Pastoral Care and Counseling:** Share in responsibility for those in need of such professional services.

- D. Ministry of Hospitality and Incorporation of Newcomers: Along with the Rector, undertake responsibility for working with the ministers of hospitality to identify, track and incorporate newcomers.
- E. Outreach Ministries: Support the various outreach ministries of the congregation, work with the Outreach Commission as needed.
- F. Diocesan Assignments: Engage in and undertake diocesan assignments as decided in consultation with Bishop, Rector, Vestry and Diocesan structure.

All duties listed herein and subject to change upon direction from the Rector.

Similarly, the listed duties are not exclusive, and the Curate/Assistant/Associate shall complete other duties as assigned by the Rector.

I. TIMES of WORK, VACATION and LEAVE

Vacation and leave with full compensation includes the following:

- A. The Curate/Assistant/Associate is expected to work full-time on a weekly basis, days and hours as arranged with the Rector. Normally this work schedule will be 40-50 hours per week. In general, no more than three evenings per week are expected. You are expected to schedule at least one continuous 24-hour period each week solely for your own personal use.
- B. National holidays (as set by the Diocese in Operations Resource Manual for Clergy and Lay Leadership), may be taken off so long as it does not interfere with worship for major occasions as determined by the Rector in the Rector's discretion.
- C. The Curate/Assistant/Associate will be provided one month of vacation per year (defined as 22 work days), which shall include four Sundays. Vacation must be approved in advance by the Rector and must be used by the end of each calendar year.
- D. Beginning _____, two weeks Continuing Education leave (defined as 10 work days), which may include one Sunday. Continuing Education leave may not be carried over to succeeding years.
- E. Ten (10) days of paid sick leave are available annually. Sick leave may not be carried over to succeeding years. Emergency and other leaves for illness and death in the family may be allowed under conditions established by mutual agreement with the Rector.
- F. Participation in diocesan activities (e.g., clergy conferences, department or committee work, retreats, family camps, diocesan camps and other conferences) will not to be counted as days off, vacation or study leave time, as these are considered job related responsibilities.
However, all such activities must be approved by the Rector or his/her designee.

II. COMPENSATION

A. Beginning _____, _____ will pay you the following compensation to be reviewed and adjusted annually.

Salary, Housing and Utilities (SHU) will be \$_____ per year.

It is understood that, upon the request of the Curate and consistent with applicable laws, the Vestry will designate a portion of the total amount as "Housing Allowance" under the Federal Internal Revenue Code.

III. BENEFITS

A. Church Pension Fund Assessment (currently 18%) on the sum of the Curate/Assistant/Associate's total annual cash salary (including Housing and Utilities Allowance)

B. Diocesan Group Medical and Dental Insurance Premiums (coverage for Curate and family).

C. Current Diocesan Group Life Insurance Premium (\$40,000 death benefit).

D. Beginning in _____, \$_____ per year for Continuing Education study.

E. Workers' Compensation Insurance, as provided by State Law.

IV. ADDITIONAL ALLOWANCES AND EXPENSE REIMBURSEMENT

A. Travel expenses as mandated by the Diocese, plus out-of-pocket costs for reasonable and necessary parking fees and tolls.

B. An allowance of \$_____. per month for use of cell phone in the course of ministry and availability for emergencies.

C. An allowance of \$_____ to help with moving expenses will be provided.

V. MUTUAL MINISTRY REVIEW

The Curate/Assistant/Associate shall participate in a mutual ministry review with the Rector and Vestry. This process is to ensure that: 1) clear parish goals are established for the coming year; 2) the Rector, Wardens and Vestry understand their individual and mutual responsibilities in support of parish goals; 3) there are opportunities to assess how well responsibilities are being fulfilled to each other and to these shared ministries; 4) areas of conflict or disappointment are isolated; and 5) solutions are designed to enhance the growth of the congregation.

VI. OTHER AGREEMENTS

A. In the event of the Curate/Assistant/Associate's death, the Vestry agrees to continue payment of the Curate/Assistant/Associate's Cash Salary (including Housing Allowance) and additional salary for medical and dental cost to his/her surviving direct dependent(s) for a period of two months.

B. This Covenant of Ministry shall be read consistently with any applicable provision of _____ Church Personnel Handbook whenever possible. In the event of a direct conflict between this letter and the Handbook, the terms of this letter shall control unless applicable law requires otherwise.

C. This Covenant of Ministry shall be made part of the minutes of the next Vestry meeting following its signing.

D. If the Curate/Assistant/Associate and the Rector and/or Vestry are in disagreement concerning interpretation of this Letter of Agreement, either party may appeal for mediation to the Bishop or his representative, or to another mutually agreed upon third party, the Bishop remaining the final arbiter.

E. This agreement will be reviewed prior to _____, ____ for the purpose of a decision on continuation.

Date: _____

Curate/Assistant/Associate

Rector

Senior Warden

cc: Treasurer; Clerk of the Vestry

8.3.5 Covenant of Ministry – Interim (Sample)

INTERIM RECTOR LETTER OF AGREEMENT

between

The Wardens and Vestry of

and

Preamble

This contract is between _____ (hereinafter called “The Church”) of _____, and _____, who is by training and experience a qualified Interim Minister (hereinafter called “Interim”).

The Interim Rector shall lead The Church as pastor, priest and teacher, sharing in the councils of this congregation and of the whole Church, in communion with our Bishop. By word and action, informed at all times by the Holy Scriptures, the Book of Common Prayer, and the Constitution and Canons of the General Convention and our Diocese, the Interim Rector shall proclaim the Gospel, love and serve Christ's people, nourish them, and strengthen them in their Christian life.

Developmental Tasks of the Interim Period

The present interim time between rectors is a prime opportunity for renewal, and for re-energizing the parish in its life and mission. Beyond maintaining effective ministry during this period, the Vestry and Interim Rector shall work together to prepare for a healthy transition to the next rector.

The Interim will not meet with the Profile or Search Committees or assist in the selection of a new rector, nor will the Interim be a candidate for permanent rector. The Interim may, if requested, advise the committee on process questions provided the chair of the Profile or Search Committee and the Canon to the Ordinary agree.

Responsibilities of the Congregation and Vestry

All ministries other than those reserved to ordained leadership (e.g., administering the sacraments) are understood as mutual ministries of the laity of the parish, the program staff, and the Interim. The Vestry shall lead the laity to support and cooperate with the Interim in pursuit of parish goals and in the performance of the developmental tasks of the interim period.

The Vestry is the legal agent for the parish in all matters concerning its corporate property and in its relationship with the Interim. The Vestry will see that the Interim Rector is properly supported, both personally and organizationally, as well as in the Vestry's financial obligations to the Interim.

Interim Rector Responsibilities

The Interim represents and extends the ministry which is the Bishop's pastoral and canonical responsibility for congregations in leadership transition. The Interim Rector shall lead the Church as pastor, priest and teacher, sharing in the councils of this congregation and of the whole church, in communion with the Bishop. The Interim Rector shall:

- Work with the Vestry and other lay leaders to maintain the regular schedule of preaching and worship, education, counseling in crisis situations, pastoral care and pastoral offices (weddings, funerals, and baptisms), calling upon the sick and shut-in, visiting newcomers, as well as attending to the ongoing administration of the parish.
- Supervise support and program staff in the exercise of their responsibilities and ministries, for which they shall be accountable to the Interim. It is understood that the support and maintenance of the current staff is a high priority.
- Support the Vestry in its ministry and responsibilities, functioning as Chair of the Vestry if requested, although this responsibility may be exercised by the Senior Warden.
- Help the Vestry, lay leaders and staff make such changes as may be needed to align parish life and administration with generally accepted standards in the diocese for the healthy exercise of mutual ministry.
- Help the congregation deal with its grief and any other unresolved issues arising from the previous rector's departure. Address any internal conflicts and help heal any divisions within the congregation.
- Prepare the congregation for the ministry of a permanent rector who will be called by the Church in due time.
- Communicate on a regular basis with the congregation, vestry and Bishop (or his representative) on the transition process during the time of interim ministry.

Compensation and Benefits

1. The Interim's salary will be the equivalent of \$_____ per annum for the period from _____ to _____ (*ending date is negotiable*).
The salary will be paid monthly on or before the last day of the month.
2. The salary is compensation for ___-time employment.
3. Compensation will be paid and designated in such a way as the Interim requests, as long as the designation is permissible under the Federal Internal Revenue Code (e.g., "housing allowance" or monies paid directed into the Interim's 403(b) Fund through Church Life.)
4. Within the guidelines set by the Church Pension Fund, pension assessments for the Interim are required of the Church at 18% of salary.
5. The Church will provide life insurance in compliance with Diocesan standards and disability insurance equal to the annual salary.
6. This contract may be extended by mutual agreement of the Interim and the Church.

Expenses and Allowance

1. The Church will provide reimbursement for travel expenses at the IRS Rate per mile, plus out-of-pocket costs of parking fees, rolls, etc., for activities that are a part of the exercise of ministry, or necessary for participation in Diocesan programs or ministries.
2. The Church will pay \$___ per month for use of cell phone in the course of ministry and to insure availability in case of emergencies.
3. The Church will reimburse the Interim for the cost of meals, housing and registration for the annual Diocesan Convention and for the annual Clergy Conference if these events fall during the term of employment.

Times of Work and Leave

The Interim's work includes not only activities directed to the parish and its well being, but also labors on behalf of the Diocese and community. Clergy are considered to be "professionals" and are expected to manage their own schedules to reflect the demands of the ministry while

maintaining their own physical and spiritual health. Work time should be managed so that there is adequate opportunity for parishioners to interact with the Interim. The Interim Rector is expected to take the time to develop and maintain a healthy spiritual life, including weekly and daily time set aside for prayer, study and meditation.

The Interim Rector will have the following periods of leave at full compensation:

1. National Holidays, to be taken so as not to interfere with worship for major occasions. Compensation days for those that interfere should be taken soon after and not accumulated.
2. The Interim will be provided with the equivalent of one month of vacation per year.
3. Vacation time must be approved in advance by the Senior Warden. The Interim may postpone up to one-half month of vacation and accumulate it until the conclusion of this appointment to be used as terminal leave. The Interim will report to the Treasurer the amount of vacation time used and available.
4. Emergency and other leaves for illness and death in the family may be provided at the discretion of the Vestry.
5. The Church will provide work time to attend Diocesan events including the annual Clergy Conference and Diocesan Convention during the time of employment with the Church.

Supplementary Compensation

The Interim shall not charge fees for performing any rites of the Church (for example: baptisms, marriage, funerals) for members of the Church, although a voluntary honorarium for marriages and funerals may be received. The Interim may, however, receive income from other sources, including sacramental services on behalf of persons not in any way related to Church, fees and honoraria for professional services performed on personal time for groups unrelated to the Church, or for sermons, books or articles published outside the parish.

Mutual Ministry Review

There shall be a discussion and mutual review of the total ministry of the parish within the first four months of the Interim's ministry in order to:

- Provide the Interim Rector, Wardens and Vestry opportunity to assess how well they are fulfilling their responsibilities to each other and to the ministries they share.
- Evaluate progress on the developmental tasks, and establish and adjust goals for the work of the parish during the interim.
- Plan healthy closure for the interim ministry and prepare for the coming of the next Rector.
- Isolate areas of conflict or disappointment which have not received adequate attention and may be adversely affecting mutual ministry.
- Clarify expectations of all parties to help put any future conflicts in manageable form.

Other Agreements

1. All compensation and benefits shall become effective on _____.
2. This Letter of Agreement shall be made part of the minutes of the next Vestry meeting following its signing, and copies shall be given to each new Vestry member thereafter.
3. This letter may be revised only by written mutual agreement.

4. This letter constitutes the full and entire agreement between the parties concerning the employment of the Interim.
5. If the Interim and Vestry are in disagreement concerning interpretation of this Letter of Agreement, either party may appeal for mediation to a mutually agreed upon third party, the Bishop remaining the final arbiter.
6. When the Interim's ministry at the Church ends, the Vestry will compensate for any earned but unrealized vacation time.
7. When the Interim's ministry at The Church ends, the Interim Rector will not be eligible for unemployment compensation.
8. Should it be necessary to dissolve this agreement, unless otherwise spelled out herein, severance will be paid at the rate set by the Standing Committee.

Termination

This agreement shall be in effect until _____ with compensation guaranteed for _____ months. Thirty (30) days notice of termination shall be given to the Interim when a call has been given to a new rector.

Should the Church wish to terminate the Interim prior to the calling of a new rector, _____ days notice shall be given. The _____ day compensation or the _____ month guarantee will be resolved in favor of the Interim.

In the event that the Interim terminates this contract prior to the call of a new rector, thirty (30) days notice shall be given to the Church and all compensation guarantees beyond thirty (30) days will be waived. Any disputes will be dissolved by mutual consent or by arbitration and decision as provided in the relevant Canons of the Diocese of Oregon and of the Episcopal Church.

Date _____ (signed) _____ Interim Rector

Date _____ (signed) _____ Senior Warden

Approved:

Date _____ (signed) _____ Bishop

8.3.6 Covenant of Ministry – Deacon (Sample)

Covenant of Ministry for the Assignment of a Deacon to a Parish

Date of Assignment: Usually one year (to be reviewed, renewed annually)

Parochial Assignment: Parish name

Rector: Name

Deacon: Name

Principal Duties

The deacon will form and illuminate the diaconal dimension of the congregation's ministry and mission as the Church in this place and time.

To further this, the deacon should:

- 1) Model diaconal ministry in the liturgy, parish community, and community at large while inviting and leading laity in their baptismal ministry.
- 2) Perform the full and proper liturgical functions of a deacon at Sunday, Holy Day Liturgies, and at other liturgies such as baptisms, weddings, and funerals by mutual agreement with the Rector, as Gospeller, Bidding the Prayers of the People, Bidding the Confession, Assisting and Preparing the Table at Eucharist, Sending Forth the Eucharistic Visitors, Dismissing the People, Preaching on a regular basis, and other agreed upon functions appropriate to the deacon. The deacon is a member of the clergy team and, as such, regular attendance/service at liturgy is expected.
- 3) Serve as full clergy member and colleague on the parish staff: Attend staff meetings when possible, attend Worship Committee meetings when possible, join in the teaching ministry, and interact with all ages.
- 4) Serve in a leadership role in bringing the concerns of the world to the church, and the church to the world. Recruit, train, and support volunteers in outreach and social ministries.
- 5) Attend Vestry meetings, when possible, with seat and voice.
- 6) Serve and assist in scheduling and training Eucharistic Ministers.
- 7) Serve and assist in pastoral visitation, including the scheduling and training of Eucharistic Visitors, and participate in shut-in, convalescent, and hospital ministries, as possible.

The Rector or Vestry should:

- 8) Establish a “Clergy Expense and Education Fund” for the purpose of reimbursing the priest’s and deacon’s expenses. Examples of reimbursable expenses include, but are not be limited to:
 - Mileage and expenses directly related to ministry in the parish (other than mileage to and from church itself);
 - Professional membership dues;
 - Continuing education coursework, as prescribed by the Canons of the Church;
 - Diocesan activities (Diocesan Conventions, Bishop’s Conferences, Clergy Conference, Diaconal Conferences, and other events as needed), including registration, room, board, and mileage;
 - Other compensation at the discretion of the Rector or Vestry.
- 9) Provide access to shared office space, when feasible and as needed, including access to a phone and clerical support.
- 10) Establish a “Deacon’s Discretionary Fund” for the use of the deacon in assisting parishioners and others with immediate needs on a confidential basis and at the discretion of the deacon. Ideally, this item shall be funded as a line item in the parish budget and be subject to annual audit.
- 11) Maintain such vestments as befit the deacon as a fully participating member of the parish’s clergy team. Vestments purchased by the parish shall remain the property of the parish. Any vestments purchased at the unreimbursed expense of the deacon, or those given to the deacon as gifts, shall be the property of the deacon.

Other Provisions:

- 12) Oversight – The deacon serves in the parochial assignment at the discretion of the bishop and is directly under the authority of the bishop. While serving in the local parish, the deacon reports to the rector.
- 13) Review – The rector and deacon will participate in an annual review process in order to discern various vocational aspects of their work in relation to the goals for the parish, and in cooperation with the staff working as a ministry team.
- 14) Vacation and Work Schedule – The deacon may, having made prior arrangements with the rector/vicar, establish a work schedule that provides for up to one Sunday away from the parish per month, in order to carry out the deacon’s diocesan role and for rest and refreshment. The deacon will be allotted a minimum of one month’s vacation each year.

15) Sabbatical – Any deacon who has served five years in the Diocese is eligible to apply for a sabbatical. A sabbatical is an extended period away from the parish for purposes such as personal growth, pastoral skills, or spiritual renewal. An application for sabbatical and additional information is available from the archdeacons.

16) Leave of Absence – With permission from the Bishop, a deacon may be granted a leave of absence, which offers the deacon an opportunity to be temporarily relieved of his/her duties. Such a leave is for a specific period of time and is intended to address mental health or medical issues. Additional information and application are available from the archdeacons.

_____	_____
Rector	Date
_____	_____
Deacon	Date
_____	_____
Bishop	Date

8.3.7 Current Compensation Schedule and SHU Administrative Practices

Full Time Clergy Annual Stipend–Housing–Utilities [SHU]

Range Structure is found on the diocesan website www.diocese-oregon.org in the Finance and Human Resources tab.

SHU Administrative Practices

- 1) The SHU Range Structure and Administrative Practices apply to all full time stipendiary clergy in the Diocese of Oregon and is used as a guideline for salary for partial stipendiary clergy as well.
- 2) Guidelines for SHU (Stipend, Housing and Utilities)
 - The Stipend, Housing Utilities Package (SHU) is limited for the purposes of the Range Structure to stipend, housing and utilities.
 - If church owned housing is provided, the applied range is reduced 20% plus the amount of any utilities provided, either in the form of actual costs paid or in allowances provided.
 - The SHU Range Structure is adjusted annually by the diocesan Personnel Committee in accordance with the Bureau of Labor Statistics, but in no case by less than a 0% (zero percent) increase.
 - It is expected that additional adjustments of individual SHU's will be considered annually as a part of evaluation reviews and congregational budgeting cycles..
- 3) Covenants of Ministry
 - Covenants of Ministry for full stipendiary clergy will be revised as changes occur; and will include the agreed SHU for the coming year. A copy of the agreement shall be on file in the Bishop's Office.
 - Covenants of Ministry must be approved by the Bishop or the Bishop's representative before the announcement of a new clergy call. The original signed document should be sent to the Bishop's Office for signature and will be returned to the church. Copies will be made for Diocesan files.
- 4) Diocesan Standard
 - Starting number of years in range on SHU chart is determined as part of negotiations between clergy and Vestry and is included in the Covenant of Ministry for approval by the Bishop.
 - SHU for full stipendiary clergy shall be no less than that established by Diocesan Council.
 - SHU for a full stipendiary assistant clergy is in accord with the range two ranges below the rector or vicar.
 - SHU for Mission and diocesan Program Clergy is in accordance with the administrative practices of the Policies and Procedures of the Diocese.
- 5) Starting SHU for a priest is determined from the SHU Range for the Congregation issuing the call, then by negotiation between the Vestry and priest. The negotiated SHU and process is subject to review by the Bishop.
- 6) Part-stipend clergy. SHU for part-time clergy shall be calculated by applying their full-time equivalent (FTE) to the amount scheduled for the position based on range and years of experience.

8.3.8 Congregation Rankings

The church congregational range system utilizes data from the Parochial Report in its formula.

The items used from the Parochial Report are as follows. The Congregation Rankings Chart uses the result of the following formula to indicate the relative range positions of all the churches in the diocese.

- 25% of the average attendance at Sunday services. (Page 2 line 6 of Parochial Report)
- 25% of the number of pledging units. (Page 3 line 1 of Parochial Report)
- 50% of the sum of Parochial Report items #10, #11, subtotal E, #16 and #17 divided by 1000.

$$\frac{[(\#10+\#11+\text{stE}+\#16+\#17)\div 2]}{1000}$$

Congregational Rankings in PDF format can be found on the diocesan website www.diocese-oregon.org in the Financial Resource Library under Finance and Human Resources

8.3.9 Continuing Education Allowance

Diocesan minimum for Continuing Education Allowance \$500 per year for full-time clergy. Continuing Education Allowances for all other staff members should be pro-rated, based on this standard.

8.3.10 Supply Clergy Compensation

The recommended Diocesan minimum standard for Supply Clergy Compensation as applied on October 2009 is as follows:

- 2 Sunday services with sermon - \$200
- 1 Sunday service with sermon - \$150
- One service without sermon, midweek or Sunday - \$100
- All rates are plus mileage, based on current IRS mileage rates.

Vestries and Bishop's Advisory Committees are urged to pass a resolution designating all future Supply Clergy Compensation as reimbursement for Housing and Utilities, in accordance with standard IRS regulations.

8.3.11 Voluntary Diocesan Mileage Allowance

It is customary to reimburse for transportation costs incurred in conjunction with voluntary participation in diocesan business. Please check on-line for the charitable mileage rates set by the IRS, as these change annually.

8.3.12 Mutual Ministry Guide

Mutual Ministry Review: OBJECTIVES

- To celebrate what is going well and to identify what needs attention/change
- To give clear and reliable feedback; speak the truth in love
- To identify lay and priestly leadership development needs
- To minimize unrealistic expectations
- To renew/establish goals and priorities for the next period of time
- To deepen rector/vestry relationship and enhance communication for the building up of the Body

Goals/priorities should be:

- Limited in number
- Specific
- Measurable, as much as possible (how will we know we've been successful)
- Achievable, within the time frame.

MUTUAL MINISTRY REVIEW: STANDARD QUESTIONS

- How did we live out/put into action our Mission Statement (the Gospel) this year?
- What was the highlight of our ministry this past year –with one another? In the world? Or, what was the most positive activity in our parish during the past year? Who was responsible for making it happen?
- Whom do you want to thank?
- What now needs the attention of the rector/vestry? What would you like to change?
- What task/goal is most important for the coming year?

MUTUAL MINISTRY REVIEW: OTHER QUESTIONS

- How would you describe the quality of our parish community life this past year?
- Last year, we set _____ as a goal. How did we do?
- What disappointed you about our ministry/mission this past year? Or, what is our greatest weakness? What is our greatest need?
- How do we feel about our liturgy and worship life?
- What attracts newcomers to our parish? What keeps them/turns them away?
- How visible and available is the vestry to members of the congregation?

- What do you believe God is calling us to do in the next _____ years?
- How do you feel the vestry functioned/lived up to its commitments this year? The rector?
- What did you learn this year? How did you grow?

8.4 Discretionary Funds and Expense Accounts

It is important for Clergy to separate their Expense Accounts from the Discretionary Fund. In the case of an audit, the taxing authorities will want to be shown that these Funds are independent of one another.

Discretionary Fund – Clarifications:

The Discretionary Fund is to be used as noted below, and not for Clergy personal expenses.

Any money used for personal use must be reported as taxable ordinary income.

Any expenditures from this fund need to be in accordance with the Episcopal Church Title III Canon 9 Section 6 (b)(6).

Suggested procedure for the flow of funds:

All monies designated as a part of the discretionary fund should be given to the Church, not the clergyperson. (This may include designated plate offerings, funds from capital gifts, designated contributions for weddings, funerals, etc.) The Treasurer deposits these funds in the Discretionary Fund Account, and this becomes part of the Church's financial record.

Two possible ways for the clergyperson to disperse funds are:

- The clergyperson makes a check request to the Treasurer who issues a check from the Discretionary Fund Account to the person in need, or
- The clergyperson writes a check to the person in need from the Discretionary Fund Checking Account. The checkbook and backup documents must be open for audit.

An outside Auditor or a Parish review team reviews the Discretionary Fund at year end, and reports to the Vestry/BAC and the Diocese.

Here are some of the items for which a Discretionary Fund should be utilized. All of these items are for the needy, poor or afflicted:

- 1) Food
- 2) Lodging
- 3) Transportation
- 4) Medical Bills
- 5) "Pious and Charitable Uses"

Expense Accounts

Expense Accounts repay the Clergy for authorized expenses they incur in the conduct of Parish Business.

Suggested Procedure:

- 1) An Expense Budget or budgets is/are established for the clergyperson by the Budget Committee, approved by the Vestry and made a part of the annual congregational budget.
- 2) The clergyperson makes expenditures in accordance with the general outlines of the suggested expense items below.
- 3) The clergyperson provides the Treasurer with bills and/or invoices for payment/reimbursement. The Treasurer issues a reimbursement check for such expenditures to the clergyperson.

Taxes and Tax reporting is not significant as regards reimbursements.

However, if a clergyperson reports expenditures at year-end which exceed reimbursements by a significant amount, it is appropriate that a donation receipt be issued to the clergyperson in the amount of the overage.

The outside auditor or the Parish review team reviews this (these) account(s) at year end, and reports to the Vestry/BAC and the Diocese.

Expense Account items are noted below. These expenditures should be related to church activities. If an expenditure is large, unclear in purpose, or cause the Budget to be exceeded there should be a prior discussion between the clergyperson and the Vestry/BAC before it is made (and documentation in the minutes of the meeting.)

Expense Items may include:

- Continuing Education - Conferences (tuition, meals and transportation)
- Auto Expense (includes an accounting for mileage)
- Business Expense
 - 1) Organizational membership costs
 - 2) Books and Journals
 - 3) Consultants
 - 4) Business meals/Business entertainment
 - 5) Other professional expenses

Note: Clergy may choose to place honoraria from weddings, funeral, baptisms, etc. (gifts not specifically designated “Discretionary Fund”) into a “Rector’s/Vicar’s Program Fund” which the clergy person administers to the benefit of the church.

All receipts and gifts must first be deposited with the Parish Treasurer and then disbursed accordingly so that there is a clear record and accountability.

8.5 Church Polity and History

8.5.1 English Church History

Summary: The beginnings of the Church of England, from which the Episcopal Church derives, dates to at least the 2nd century, when merchants and other travelers first brought Christianity to England. It is customary to regard St. Augustine of Canterbury’s mission to England in 597 as marking the formal beginning of the church under papal authority, which would continue through the Middle Ages.

In its modern form, the church dates from the English Reformation of the 16th century, when royal supremacy was established and the authority of the papacy was repudiated. With the advent of British colonization, the Church of England was established on every continent, and thus achieved international importance. In time, these churches gained their independence, but retained connections with the Church of England through the Anglican Communion.

Spread of The Church: From the time of the Reformation, the Church of England followed explorers, traders, colonists, and missionaries into the far reaches of the known world. The colonial churches generally exercised administrative autonomy within the historical and credal context of the Church of England.

As the successor of the Anglo-Saxon and medieval English Church, it has valued, and preserved or reclaimed much of the traditional framework of medieval Catholicism in church government, liturgy, and customs, while it also has usually held the fundamentals of Reformation faith.

History of The English Church: The conversion of the Anglo-Saxons, who began invading Britain after Rome stopped governing the country in the 5th century, was undertaken by Augustine of Hippo, a monk in Rome chosen by Pope Gregory I to lead a mission to the Anglo-Saxons. He arrived in 597. At approximately the same time as Roman Christianity, with its regional diocesan structure clearly under the direct authority of the Pope, was being introduced to southern England by Augustine, monks from Ireland led by Columba, Aidan, and Bede began spreading Celtic Christianity across northern England and Scotland. Celtic Christianity was organized in relation to newly established monasteries – a hub and spokes model, if you will – and thus only indirectly under the authority of the Pope (through the monastic structure). Despite this regional difference, within 90 years, all the Anglo-Saxon kingdoms of England had gradually accepted Christianity, and Roman Christianity had become dominant.

In the 11th century, the Norman conquest of England (1066) united England more closely with the culture of Latin Europe. The English Church was reformed according to Roman doctrine and discipline: local synods were revived, celibacy of the clergy was required, and the canon law of Western Europe was introduced into England.

The English Church shared in the religious unrest characteristic of the latter Middle Ages which saw the advent of a number of “heretical” movements. John Wycliffe, a 14th century English theologian, became a revolutionary critic of the papacy and was the first to translate the Bible into English. His actions and teaching led to the development of Lollardy, a distinctively medieval English reform movement deemed heretical by the Church of Rome, in no small part, because it promoted direct access to and discussion of the Scriptures by laypeople. Vestiges of Lollardy could still be found in England in the early sixteenth century and may have contributed to the welcoming of Protestant ideas in England during that time.

The English Reformation which dominated the sixteenth century was a result of both the spread of Protestant beliefs and the monarch's need to produce an heir. Lutheran and Swiss Reform ideas spread rapidly in the 1520s, both through books read and discussed at Oxford and Cambridge, and through the sharing of the experiences of seamen who called on German ports during this time. As news of these ideas and experiences spread throughout England, there was a gradual acceptance of Protestant beliefs in some regions and among some groups, even though they were still considered heretical. Simultaneously, Henry VIII was becoming increasingly anxious about the continuation of the Tudor Dynasty after his death. The Tudors had a rather tenuous hold on the monarchy, because Henry VIII's father had seized the crown on the field of battle and in defiance of a statute of Parliament specifically prohibiting any descendant of his grandfather from becoming King of England. Ultimately, Henry VIII's specific actions to secure the throne for his descendants precipitated the break with Rome that then accelerated the acceptance of Protestantism somewhat, although the Church in England would not officially become Protestant until after Henry's death, and most ordinary people continued in their Roman Catholic faith rather than turning to Protestantism.

The break with the Roman papacy and the establishment of an independent, but still Catholic, Church of England came in the 1530s when Pope Clement VIII refused to approve the annulment of Henry's marriage to Catherine of Aragon, and the English Parliament, at Henry's insistence, passed a series of acts that separated the English Church from the Roman hierarchy, and, in 1534, made the English monarch the head of the English Church. A short time later, the monasteries were suppressed, though more for financial than religious reasons, but few other changes were immediately made, since Henry intended that the English Church would remain Catholic, though separated from Rome.

After Henry's death, Protestant reforms, including worship in English and the first two Books of Common Prayer, were introduced in the English Church during the six-year reign of Edward VI. In 1553, however, following Edward's untimely death, his half-sister, Mary, a Roman Catholic, succeeded to the throne and returned England to the Catholic fold. During her five-year reign, a number of Protestants were burned for their faith, but many more either fled into exile in Protestant cities on the continent or sought to conceal their beliefs from the authorities. However, the majority of her subjects seem to have breathed a deep sigh of relief as the familiar faith and worship they had known for much of their lives returned.

When Elizabeth I, Henry's second daughter, became queen late in 1558, an independent Church of England was reestablished. The Book of Common Prayer, was revised and re-published, providing the standard for liturgy, and along with the Thirty-Nine Articles (approved by Parliament in 1571), provided the guidelines for English Protestant beliefs. Gradually the people came to embrace this new faith. Through their experience of it in regular worship week by week, it became familiar and began to feed them spiritually.

Movements Within The Church: The Evangelical Movement in the 18th century tended to emphasize the Protestant heritage of the Church, while the Oxford Movement in the 19th century emphasized the medieval Catholic heritage. These conflicting priorities – sometimes characterized as “Low Church” and “High Church” – have persisted to some extent in the Church. In the 19th century, the Church also became active in the Ecumenical Movement. Ironically, in addition to prompting overtures to other Christian denominations, this development led those all over the world who recognized their roots in the Church of England to articulate the basic precepts of their faith more clearly and to affiliate more closely with one another by forming the Anglican Communion.

Polity of The Church of England:

The Church of England has maintained the episcopal form of government found in Roman Christianity. It is divided into two provinces, Canterbury and York, each headed by an Archbishop, with Canterbury taking precedence over York. The provinces are divided into dioceses, each headed by a Bishop and made up of numerous parishes. Bishops are appointed by the monarch in consultation with the Archbishops, and since the late-eighteenth century, also in consultation with the Prime Minister.

The Church of England is identified by its adherence to the threefold ministry of bishops, priests, and deacons, and by a common form of worship found in the Book of Common Prayer. The Church also is characterized by a common loyalty to Christian tradition, while seeking to accommodate a wide range of people and views. It holds in creative tension the authorities of tradition, reason, and the Bible.

Worldwide Anglican Church Polity: It was probably not until the late nineteenth century that there emerged among the various churches and councils a mutual consciousness of Anglicanism. This consciousness led to and was enriched by the creation of establishment of the Lambeth Conference: a gathering typically held every ten years beginning in 1867 comprised of bishops from all over the Anglican Communion at the invitation of the Archbishop of Canterbury. Although its decisions do not bind the autonomous churches of the Anglican Communion, the Lambeth Conference has constituted the principal cohesive factor in Anglicanism. While many factors account for variations in the basic structure among the churches, several elements do predominate. Perhaps most notably, the diocese under the leadership of a bishop is the basic administrative unit throughout the communion.

8.5.2 American Church History

Early Period: Establishment of parishes on the American continent began to spread steadily following the first recorded celebration of Holy Communion in the New World in 1607 in Jamestown, Virginia. This conformed to the typical colonial expansion pattern the English Church would later follow in other parts of the world.

During the American Revolution, northern clergy tried to maintain ties with the English Society for the Propagation of the Gospel (SPG) and to support England, while those in the South tended to be more sympathetic to the Revolution.

The “American Revolution left the Anglican parishes shattered, stripped of most of their financial support, weakened by the flight of many clergy and thousands of members, with a number of buildings destroyed and property lost,” wrote Powell Mills Dawley in *Our Christian Heritage*.

After the war, SPG support was cut off, and governmental support of churches was withdrawn because of newly-accepted principle of separation of church and state. The American churches also lost the oversight of a bishop, since previously Episcopal authority for the North American colonies had rested with the Bishop of London.

Establishment Period: By 1784, most states had agreed on the need to (1) draft a binding constitution for the whole church; (2) revise the English Book of Common Prayer to make it appropriate for use in the American church; and (3) obtain consecration of bishops in Apostolic Succession to give the American Church proper episcopal oversight and ministry, although church leaders were split over whether the American Church needed bishops in Apostolic Succession.

Meanwhile, on March 25, 1783, 10 Connecticut clergy elected Samuel Seabury as their bishop. Seabury traveled to England, but English canon law prevented the consecration of any clergyman who would not take the Oath of Allegiance to the English Crown. Seabury then sought consecration in the Scottish Episcopal Church, where he was ordained on Nov. 14, 1784 in Aberdeen. Thus, Seabury became the first bishop of the American Episcopal Church.

By 1786, English churchmen had helped change the law so the Church of England could offer episcopal consecration to those churches outside England. On Feb 4, 1787, the Archbishop of Canterbury and three other English bishops consecrated William White as Bishop of Pennsylvania and Samuel Provoost as Bishop of New York. Soon after, James Madison was consecrated in England as the Bishop of Virginia and President of The College of William and Mary in Williamsburg. When Seabury, White, Provoost and Madison joined to consecrate Thomas Claggett in Trinity Church in New York in 1790, the episcopate in the American Church could declare its independence from the Church of England.

Meanwhile, an assembly of the American Church met in Philadelphia in 1789 just as the American Constitutional Convention was completing its work in another location in that great city. The purpose of the meeting of American Church leaders was to unify all Episcopalians in the United States into a single national church. A constitution was adopted along with a set of canon laws. The English Book of Common Prayer of 1662 was revised in two respects. The prayer for the English monarch was removed, and the Eucharistic Prayer was substantially revised, as a result of an agreement reached by Seabury prior to his consecration, so that it would include key aspects of the version of that prayer found in the Scottish Prayer Book of 1764. This prayer included the invocation of the Holy Spirit during the consecration of the bread and wine, which one not present in the English Prayer Book.

The new constitution of the American church provided for annual diocesan conventions with the bishop of the diocese as presiding officer. A national General Convention was also established, composed of two houses of legislature, and modeled after the United States Congress. In addition, a system of checks and balances similar to that of the new federal system was incorporated into the Church’s constitution.

As the United States began its westward expansion, the church followed. Missionary bishops went into the new territories to minister to the far-flung and sparsely populated western parishes and congregations, often writing to the parishes they had only recently left to solicit funds in support of their efforts in the hinterlands.

Civil War Period: When South Carolina seceded from the Union in 1860, she was followed by 10 more southern states. In 1861, the Protestant Episcopal Church in the Confederate States of America was established – in every way the same as before except for its name change and its loyalty to the Confederacy. But the northern church declined to recognize any separation. Throughout the war, church members on both sides maintained old friendships and bonds of Christian union. Seven months after the fall of Richmond in 1865, the Confederate group quietly disbanded.

American Church Polity: General Conventions have added to, but not substantially changed a basic polity established in 1789 in which a democratic, lay-dominated parish structure exists in tension with an episcopally-dominated central governance structure. Each self-supporting congregation (parish) elects its lay governing board (vestry) for temporal affairs and its rector as spiritual leader. Congregations that are not self-supporting (missions) are directed by the bishop of the area. In a given area, the parishes and missions make up a diocese, headed by a bishop. All clergy, along with lay representatives, from all congregations meet annually in convention to conduct the business of the diocese. The convention elects the bishop to serve until death or retirement.

General Convention: The dioceses and missionary districts in the United States meet triennially in General Convention. All bishops are members of the House of Bishops, and the House of Deputies is made up of equal numbers of clergy and laity, elected by their diocesan conventions. The Executive Council, the administrative agency of the General Convention, is headed by the Presiding Bishop (PB) (elected by the House of Bishops and confirmed by the House of Deputies). The PB also presides over the House of Bishops. Decisions at General Convention are made by joint-concurrence of the House of Deputies and the House of Bishops.

Provinces: The 109 dioceses of the Episcopal Church are organized into nine provinces, each governed by a synod consisting of a House of Bishops and a House of Deputies. The Episcopal Church is a part of the Anglican Communion.

Modern Period: Conventions of the 1950s and 1960s tended to ignore increasing pressure from women to demand ordination as Deacons and Priests in the Church. The General Convention of 1970 allowed women's ordination to the diaconate. But this was not enough to satisfy the needs for equality. In 1974, eleven women were ordained to the priesthood in Philadelphia. The Church was in an uproar; the ordinations were reported in news media throughout the country; the Presiding Bishop pleaded with the ordaining bishops to reconsider; some churches withdrew in outrage. The House of Bishops declared the ordinations invalid, saying that the 11 women remained Deacons.

After the General Convention met in 1976 and voted to allow women to be eligible for ordination to both the priesthood and the episcopate, the ordinations of the eleven who had been priested in 1974 were regularized. Ordinations to the episcopate of a woman would not take place until the ordination of Barbara Harris as Suffragan Bishop of Massachusetts on February 11, 1989. The first woman to serve as Presiding Bishop was Katharine Jefferts Schori, who was invested with the symbols of the office on November 4, 2006.

A completely revised Book of Common Prayer was adopted in 1979, and an updated Hymnal was adopted in 1982. Since that time the relevant standing commissions of The Episcopal Church have continued to develop worship resources, including additional liturgies and books of songs and hymns for congregational use.

Throughout its history, the Church has reached out to help persons in trouble, sorrow, sickness, need, or other adversity. This has been most obvious during times of national urgency or wartime. Since the mid-1960s, the Church has taken an ever more active role in social and health concerns of all kinds through special conventions such as that held in Detroit in 1965 in the wake of urban rioting there and elsewhere across the United States, and through official programs of the Church such as the Episcopal Peace Fellowship, the Episcopal Public Policy Network, and "One Episcopalian," the movement established to promote the funding of the Millennium Development goals of the United Nations .