



**POLICY
and
PROCEDURES
MANUAL**

**The Episcopal Diocese
Of Eastern Michigan
924 N. Niagara Street
Saginaw, MI 48602**

August 2015

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN
POLICIES & PROCEDURES
TABLE OF CONTENTS
February 2010

<u>Page</u>	<u>Policy Name</u>
1.1	Baptism and Confirmation
2.1	Clergy Vacancies (Filling)
3.1	Deacon's Communion Services
4.1	Licensing of Lay Liturgical Ministers
5.1	Loans and Grants
6.1	Marriage and Re-Marriage
7.1	Retired Clergy
8.1	Supply Clergy Licensing
9.1	Travel
10.1	Continuing Education
11.1	Deacon's Expenses
12.1	Accountable Reimbursement Plan
13.1	Credit Card Policy

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN
Baptism And Confirmation Policy

Candidates for confirmation will normally be sixteen years of age or older, making a mature public affirmation of their faith. Adults baptized with the laying on of hands by the Bishop are considered to be baptized and confirmed and are not to be presented for confirmation.

Approved: January 21, 1995
Revised: June 5, 1997
Revised: October 2, 1997

Search Process for a Rector/Missioner

in the Episcopal Diocese of Eastern Michigan

It shall be the responsibility of the Sr. Warden and Vestry to be sure that all of the following checkpoints are fulfilled in a timely fashion. Please call the Diocesan Deployment Officer at any time if you need assistance.

Date
Completed

1. Incumbent notifies the Bishop and Sr. Warden of intent to accept new position.
2. Sr. Warden contacts Bishop to arrange Bishop's meeting with Vestry.
3. Process of selecting Interim Rector is begun (see 2.3: "**Search Process for Interim Rector**").
4. Vestry works with incumbent Rector/Missioner (hereinafter referred to as "Rector") to develop schedule of events related to departure of incumbent.
5. Vestry selects Interim
6. Vestry appoints Congregational Self-Study Team (CSST)
7. CSST conducts a Self-Study and begins to write a Profile
8. CSST presents rough draft of Profile to Vestry and Diocesan Deployment Officer (DDO)
9. Vestry appoints Search
10. Search Committee Orientation led by DDO.
11. CSST interprets the Self-Study and completes Profile (with assistance from DDO).
12. CSST presents the Profile to Vestry and to the DDO for approval.
13. Bishop reviews and approves Profile or makes recommendations for changes.
14. CSST prints Profile publicity piece and prepares packets for mailing to potential candidates.
15. DDO identifies candidates through the National Church Deployment Office and the Deployment Ministry Conference. Other candidate names may be included by nomination of the Bishop, recommendations from congregants, or by self-nomination. All potential candidates receive a preliminary review by the DDO and Bishop before being considered by the Search Committee.
16. Search Committee mails packets to potential candidates.
17. Search Committee screens potential candidates.
18. Search Committee interviews candidates by phone and by site visit(s).
19. Search Committee determines 3-5 finalists and communicates names to Bishop and DDO.
20. Bishop calls Bishops of finalists to verify that they are duly qualified priests in good standing.
21. DDO requests Oxford Documents background checks on 3-5 finalists (cost paid by congregation).
22. Search Committee selects Nominee from among finalists and submits name to Vestry.
23. Search Committee notifies the Bishop and the DDO of Nominee.
24. Vestry interviews Nominee, elects Rector & notifies Bishop **in writing** of desire to issue a Call.
25. Bishop gives final consent to Call and Vestry issues Call to Rector-elect
26. After acceptance, Vestry writes a Letter of Agreement in consultation with Diocesan Administrator.
27. Letter of Agreement is approved and signed by Rector-elect, Sr. Warden, and Bishop.
28. Public announcement of Acceptance of Call is made by Sr. Warden.

Calling an Assistant Clergy Person

in the Episcopal Diocese of Eastern Michigan

NOTE: *While the call of an assistant clergyperson is the responsibility of the Rector, s/he usually works with a sub-committee of the Vestry in conducting a search for an assistant.*

Date Completed	
_____	1. The Rector notifies the Bishop, Dean, and Diocesan Deployment Officer (DDO) <i>as a courtesy</i> .
_____	2. Contact the Diocesan Administrator for help in creating a ministry description and writing a preliminary letter of agreement.
_____	3. Complete the calculations in Appendix D of the Personnel Policy Manual to determine a salary range to be offered. Current rates for life insurance, health insurance, etc. are available from your church treasurer or from the Diocesan Administrator.
_____	4. Contact the DDO for help in doing a self-study and/or creating a computer profile sheet for use with the Church Deployment Office, if desired.
_____	5. Post position with CDO and/or advertise open position.
_____	6. Rector and Committee review CDO Profiles and resumes of identified candidates and narrow list for interview purposes. Phone interviews may be done at this point
_____	7. Submit short list of names to the Bishop for review and to initiate the background check. The initiation of the background check process must be done before any candidate is invited into the congregation for an interview although phone interviews may take place before the names are submitted. Background checks take a minimum of six to eight weeks to be completed. The Diocese requires that background checks be completed prior to ordination, employment, or acceptance into the Diocese.
_____	8. Arrange for the Bishop to interview the candidates when they are in town.
_____	9. Select a candidate and request permission from the Bishop for call of candidate. Upon written notification of approval from the Bishop's Office, the call may be issued.
_____	10. Negotiate a final Letter Of Agreement. The Clergy in Charge will forward a draft copy of the Letter Of Agreement to the Diocesan Administrator for review and comment prior to final execution of the document. Final Letter of Agreement is signed by Assistant-elect, Rector, Sr. Warden, and Bishop.
_____	11. Contact all other clergy under consideration that a selection has been made.

Search Process for an Interim Rector

It shall be the responsibility of the Sr. Warden and Vestry to be sure that all of the following checkpoints are fulfilled in a timely fashion. Please call the Diocesan Deployment Officer at any time if you need assistance.

Date
Completed

1. Following the Bishop's initial meeting with the Vestry, the Diocesan Deployment Officer (DDO) meets with the Vestry to outline Interim Rector Selection Process
2. Through conversations with the Vestry, Congregation Staff, and other key Congregational Leaders, the DDO guides the vestry in writing a brief statement describing the congregation and an initial understanding of the primary tasks of the Interim Period.
3. Based on the above, a search for potential Interim Rector candidates is initiated by the DDO. Candidates for the position of Interim Rector are identified through the Bishop's Office, the Church Deployment Office of the National Church Center, the Deployment Ministry Conference and through informal networks/contacts.
4. Potential Candidates receive an initial "paper review" by the Bishop and then names are forwarded to the Vestry for consideration.
5. Vestry selects suitable candidates for offsite and onsite interviews.
6. Vestry notifies the DDO of finalists names and Oxford Documents background checks are initiated. (cost paid by congregation).
7. Interviews are conducted; candidates are evaluated; a primary candidate is identified by the Vestry.
8. The primary candidate's name is submitted in writing to the Bishop, along with a request in writing to issue a call to the candidate.
9. Upon approval from the Bishop, call is issued to candidate.
10. If call is accepted, Bishop is notified and a public announcement of call is made to the congregation
11. A letter of agreement is negotiated with the Interim Rector-elect in consultation with the Diocesan Administrator.
12. Interim Rector begins his/her duties in congregation.

Qualifications of an Interim Rector

- ♦ **Trained (or in process of receiving training) or prior experience as Interim**
- ♦ **Works well with volunteers**
- ♦ **Successful in pastoral care**
- ♦ **Experienced in church administration**
- ♦ **Demonstrated ability to plan and lead worship**
- ♦ **Adapts to new situations quickly**
- ♦ **Agrees not to be a candidate for the Rector position**

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN
Deacon's Communion Services Policy

In establishing this policy, the Diocese is mindful that many bishops, including the present bishops of the other Michigan dioceses, either prohibit or strictly limit deacon's communion services. At the same time, the Diocese is aware that the services of a presbyter are sometimes difficult to obtain in some areas of our Diocese. Therefore authorization to lead worship and distribute communion from the reserved Sacrament may be granted when the following conditions are observed.

1. Diligent efforts to obtain the services of a presbyter within reasonable travel distance must be made before requesting authorization for a deacon's communion service.
2. Authorization must be secured in advance for each individual service. Blanket or general authorization will not be given. Requests for authorization should be directed to The Rt. Rev. Todd Ousley, 924 N. Niagara St. Saginaw, MI 48602, telephone: 1-877-752-6020.
3. The titles, "Deacon's Mass," or "Deacon's Eucharist" should not be used in the bulletin or other parish communication. Instead, the service should be identified as: The Distribution of Holy Communion by a Deacon according to the Book of Common Prayer, Holy Eucharist, Rite____
4. The directions given in the Book of Common Prayer, pp. 408–409, should be strictly adhered to. There should be no Sursum Corda or Preface, no breaking of the bread, no saying of "Christ our Passover," and no final blessing.
5. If a printed order of service is used, the title, "The Celebrant" should not be used. Instead, use, "The Deacon."
6. In the order of service, at the time of communion, the description should read: Holy Communion from the reserved Sacrament.
7. In any bulletins, the Prayer Book authorization for the service (including page numbers) should be cited, so that everyone is clear about the deacon's authority and the order of service.

Please study carefully the statement about the role of deacons and the suggestions for diaconal leadership of worship, which accompany these guidelines.

Approved: September, 1995
Revised: June 5, 1997

THE ROLE OF DEACONS

The recovery of the true nature of the Diaconate is one of the riches that have come out of the liturgical renewal of the twentieth century. Deacons are beginning to be understood and appreciated for what they are – a distinct and equal order, a servant ministry to the world and within the community of faith. Deacons are not "priests-in-training," nor is their ministry *primarily* liturgical. The Catechism summarizes it thus, "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."

The Deacon in the Liturgy

The deacon's liturgical role is one of service. The Prayer Book explicitly reserves the presiding role at Eucharist and the pronouncing of absolutions and blessing to bishops and presbyters. Deacons are explicitly given other *assisting* functions; in fact, some Prayer Book rites require deacons for their fullest celebration. In his definitive book, *The Diaconate: A Full and Equal Order* (New York: Seabury Press, 1981), The Rev. James M. Barnett lists the following liturgical functions of the deacon (explanatory notes following each item have been omitted for the most part):

1. To carry the paschal candle, chant the Exsultet, and assist at baptism and the Eucharist at the Easter Vigil.
2. To assist in the administration of baptism and in some instances (with the bishop's authorization) to officiate at baptism. (It is appropriate for deacons to do the actual immersion or pouring for those they have prepared when a bishop or priest is presiding.)
3. To announce the stages of the Eucharistic Liturgy.
4. To read the Gospel at the Eucharist.
5. To bid the prayers of the people.
6. To prepare the people's oblations at the Eucharist.
7. To administer the Bread and the Wine of the Eucharist.
8. To perform the ablutions at the Eucharist.
9. To take the Eucharistic Bread and Wine to the absent.
10. To assist at marriages and to solemnize marriages in the absence of an ordinary minister (bishop or priest) of marriage. (Episcopal deacons may so function only when no bishop or priest is available and may not use the nuptial blessing.)
11. To administer Holy Unction to the sick.
12. To preside at non-Eucharistic prayer services, such as Morning and Evening Prayer and Non-sacramental penitential rites.
13. To conduct services in homes for the aged and disabled.
14. To read services in congregations without a priest or pastor.
15. To lead the Church's music.
16. To officiate at burial rites, except the Eucharist.
17. To deliver homilies when officiating at a baptism, marriage, burial, or other liturgical services in place of a priest or pastor.

Barnett concludes, "Deacons should be prominently in evidence as normal and *necessary* ministers in the Church's worship, especially at the Sunday Eucharist" (pp. 182–3).

The Role of Deacons - Continued

The omission of deacon's communion services from this very comprehensive list is significant. The 1979 Book of Common Prayer is the first Anglican Prayer Book to permit a deacon's communion service (as distinct from deacons carrying the Sacrament to those unable to be present at the service). It is not envisioned as a normal part of a deacon's ministry, but as exceptional, an accommodation to extraordinary circumstances. Widespread use of deacon's communion services would continue to foster the misunderstanding of deacons as "priests-in-training" or second-class clerics. That would not be helpful at this time of regaining the integrity of the role of the deacon within the church.

The Nature of the Liturgical Action of the Eucharist

In the practice of the early church, Eucharist was understood to be the *dynamic action of the gathered people of God*. The bread and wine were of course perceived to be vehicles of God's presence, but the early church focused more upon the action of making Eucharist than upon the elements. When the consecrated elements were carried forth from the weekly celebration to communicate those who could not be present, this was seen as an extension of the liturgical action. Those who received the consecrated bread and wine participated in communion with the Body of Christ as manifested in the action of the community.

The church's understanding of the Eucharist underwent a major theological shift in the middle ages. Increasingly, the Eucharist was seen as the action of the priest rather than the action of the entire community. The congregation came to see itself as the recipients of grace in communion (a "substance") rather than as the manifestation of that grace (an "action"). This led to a focus on the consecrated bread and wine, and the dynamic action of the gathered people of God was reduced to the passive observance of an action performed on their behalf by the priest. The community no longer understood itself as the Body of Christ, at least on a popular level.

The liturgical movement of the twentieth century has done much to renew the understanding of Eucharist as action, not only in the Episcopal Church but also in many others. The *Book of Common Prayer, 1979* states that in all services, "the entire Christian assembly participates in such a way that the members of each order within the Church, lay persons, bishops, priests and deacons, fulfill the functions proper to their respective orders" (p 13). This calls for the *full, conscious and active participation of the entire liturgical assembly in the action of the Eucharist*. No longer is the Eucharist considered to be an action done on behalf of the people by the clergy. Rather, it is once again the action of the entire people of God.

As a church, we are just beginning to appropriate this understanding. We must do everything possible to focus our attention upon that Eucharistic action. Perhaps the most serious objection to deacon's communion services is that they of necessity focus on the consecrated elements rather than the action of praise and thanksgiving of the Eucharistic prayer. While it is obviously a concern that every congregation has the sacramental ministrations of the church, a deacon's communion service is no substitute for these ministrations and does not lead us into a fuller comprehension of the nature of the Eucharist. Deacon's communion services are at best a stop-gap measure as the Diocese of Eastern Michigan moves toward total ministry, with the goal of ministry teams in even the smallest and most remote congregations.

Particular Situations

1. Help! The priest got sick in the night / can't get through the snowdrift / etc.

A deacon's communion service is not normally the answer to these last-minute or emergency situations. There is not time to request authorization, or to prepare the congregation.

In congregations accustomed to Eucharist every Sunday, the deacon could officiate at the Liturgy of the Word, following the rubric beginning at the bottom of p. 406. This would involve the least confusion for most congregations.

If the congregation is familiar with Morning Prayer, the deacon could officiate at that service. To make it easy for the congregation to sing the canticles, use Cantic 6 or 20, or whatever cantic is being used as the song of praise at the beginning of the Eucharist, as one of the canticles following the lessons, and consult the index of "Hymns based on Canticles and other Liturgical Texts" on p. 680 of the Service Music Accompaniment volume for metrical versions of other canticles.

2. The nursing home wants me to do a service.

If there are Episcopal communicants in a nursing home, the deacon may use the service, "Communion under Special Circumstances," p. 396, BCP. The service may be adapted to the needs and abilities of those attending; additional lessons may be used, the prayers may be one of the six forms given on pp. 383–395 or may be considerably shorter. If Holy Unction is desired and the services of a priest have not been available, anointing may follow the Confession of Sin and Declaration of Forgiveness. Residents of other traditions who might wish to attend would certainly be welcome. However, if the deacon is asked to rotate with clergy from the community in leading a service open to all, a simple service of the Word with hymns, readings, a homily and prayers, would be appropriate.

Approved: September 7, 1995
Revised: June 5, 1997

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN
Licensing Of Lay Liturgical Ministers Policy

“The Book of Common Prayer states that “The ministers of the Church are: lay persons, bishops, priests, and deacons.” (p.855)

Laypersons are seen more and more in liturgical pastoral, and administrative roles with the Church.

To describe the duties for Lay Ministers, Title III, Canon 4, Section 1(a) states:

“A confirmed communicant in good standing or, in extraordinary circumstances subject to guidelines established by the Bishop, a communicant in good standing, may be licensed by the Ecclesiastical Authority to serve as Pastoral Leader, Worship Leader, Eucharistic Minister, or Catechist. Requirements and guidelines for the selection, training, continuing education and deployment of such persons shall be established by the Bishop in consultation with the Commission on Ministry.”

Therefore, the ministries to be licensed by this Diocese as specified in the Canon include:

Worship Leader – forms attached
Eucharistic Minister – forms attached
Eucharistic Visitor – forms attached

Persons so licensed will serve under the direction of the cleric in charge of their particular congregation or the Dean of the Convocation in which they will officiate should there be no cleric in residence.

In accordance with this Canon the Diocese of Eastern Michigan established the following policy to grant Licenses to these various ministries:

WORSHIP LEADER

“A Worship Leader is 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. [Title III, Canon 4, Section 4]

The method of obtaining and issuing licenses is as follows:

- I. A priest in charge of the congregation in which the person will be serving should adequately prepare persons selected for the ministry of “Worship Leader”; or, in the case a priest may not be in residence, a priest in another Episcopal congregation or someone designated by the diocese.

Licensing Of Lay Liturgical Ministers Policy - Continued

II. The following competencies are required:

1. Demonstrates knowledge of and ability to lead various worship services such as Morning and Evening Prayer, Compline, The Liturgy of the Word (from The Holy Eucharist), Baptism, Reconciliation of a Penitent, Ministration to the Sick, Ministration at the Time of Death, Burial of the Dead, Festival of Lessons and Carols
2. Demonstrates good public speaking skills
3. Demonstrates the ability to read and interpret rubrics
4. Demonstrates knowledge of the church calendar and the ability to determine ecclesiastical dates
5. Demonstrates knowledge of the Bible and its organization
6. Demonstrates ability to find assigned readings for services of worship
7. Demonstrates ability to plan and execute a service of worship, including appropriate hymns and prayers.
8. Demonstrates a clear rationale for liturgical options exercised and is consistent in applications of this rationale
9. Demonstrates knowledge of vestments and other related practical matters related to executing public services of worship.
10. Demonstrates knowledge of basic church history, particularly in reference to the development of Anglicanism and the Book of Common Prayer.

In some congregations, a Worship Leader also functions as a Eucharistic Minister. If this is the case in your congregation, the following competencies for Eucharistic Minister are also important:

1. Demonstrates familiarity with the Eucharistic liturgy including words, mechanics of the service, variety of rites, prayer options.
2. Demonstrates respect for the sacraments
3. Demonstrates knowledge of how to administer the chalice and the approved methods of intinction
4. Demonstrates awareness and sensitivity to people with varying needs such as children, people with special physical or mental needs, people from other eucharistic customs
5. Demonstrates sensitivity to the needs and/or unique expectations of the liturgical presider

III. When the candidate is ready to take the test one may be obtained through the Bishop's Secretary at the Diocesan Center (1-877-752-6020). If there is some kind of problem with understanding an answer, the candidate will be e-mailed for further definition or instruction. Send the completed test/application to the Diocese of Eastern Michigan, 924 N. Niagara St., Saginaw, MI 48602. In the absence of a priest-in-charge in a local congregation, the test/application must be signed by the Convocation Dean. The Bishop's Secretary will send the exam to one of our exam readers. If the candidates have difficulty in a particular area, they will be contacted for clarification by the reader. ***There are no failures!*** If they continually have difficulty the problem area will be forwarded to the trainer for further instruction.

- IV. Upon successful completion of the test, the applicant and the Bishop's office will be notified and a license will be issued to the priest-in-charge.
- V. Licenses must be renewed every three years and run from the first Sunday of Advent, year "A" through the Last Sunday after Pentecost, year "C." Reminder letters and renewal forms are usually sent to everyone the middle of October.
- VI. Once a person has passed the examination, their name will be listed in the diocesan office as a Worship Leader. This data bank will be automatically checked with each license request or renewal. Also, clergy must notify the diocesan office should there be a death or removal of a Worship Leader so the records may be kept up to date.

Revised: January 2009

LAY PERSONS SERVE IN OTHER ROLES do not require licensing

1. Leader of “Private” Worship:

A person called upon to lead private or small group worship (e.g., a service of Compline at the close of a vestry meeting) is not required to be licensed.

2. Lector:

A Lector is a person trained in the reading of the Word and appointed without license by the Member of the Clergy in charge of the Congregation to read lessons or lead the Prayers of the People. Lectors need not be licensed in order to read the lessons before the Gospel at the Holy Eucharist or any lesson at Morning Prayer.

However, they should receive instruction and assistance with their duties from the cleric in charge of the congregation.

PASTORAL LEADER

“A Pastoral Leader is a Lay Person authorized to exercise pastoral or administrative responsibility in a congregation under special circumstances, as defined by the Bishop.”

[Title III, Canon 4, Section 3]

Training for licensing shall be done under the direction of a cleric appointed by the Bishop or Ecclesiastical Authority and shall include the following:

- The Holy Scriptures, contents and background;
- The Book of Common Prayer and The Hymnal;
- The conduct of public worship;
- Use of the voice;
- Church History;
- The Church's Doctrine as set forth in the Creeds and An Outline of the Faith,
commonly called the Catechism;
- Parish Administration;
- Appropriate Canons;
- Pastoral Care;

Following successful completion of training and examination in this ministry, a License may be issued at the discretion of the Bishop or Ecclesiastical Authority.

PREACHER

“A Preacher is a lay person authorized to preach. Persons so authorized shall only preach in a congregation under the directions of a Member of the Clergy or other leader exercising oversight of the congregation or community of faith. ” [Title III, Canon 4, Section 5]

PREACHING POLICY (Approved February 17, 2010)

Authorized to preach

1. Bishops, Priests or Deacons in good standing in The Episcopal Church (TEC);
2. Preachers (re: Title III, Canon 4, Section 5 referenced above)
3. Ordained ministers from those denominations in which TEC has entered into formal ecumenical agreement

Others authorized to preach

1. **During Discernment for Holy Orders.** A person may be authorized by the Bishop to preach. For example, the COM and/or the parish discernment committee may ask an applicant for holy orders to preach as a part of his/her discernment process. It is the Bishop's understanding that the supervising cleric sees the sermon before it is preached. Such authorization usually has a specific time limit.
2. **During Participation in Preaching Practicum.** Students participating in the Coppage-Gordon School's Preaching Practicum preach three times at their home congregation during the course of the 12-month program. The instructor of that program oversees the development of the sermon and hears or sees a final draft before it is delivered. A student may be authorized by the Bishop to preach more than three times but oversight is required (class instructor, rector, dean of the convocation).
3. **During Participation in the Coppage-Gordon School's Local Formation Program.** Postulants enrolled in the preaching class at the Coppage-Gordon School's local ordination formation program taking the preaching class during year two are authorized to preach at The School as well as at their home congregation during the time they are taking the class. The instructor of this class oversees the development of the sermon(s) and hears or sees a final draft before it is delivered.
4. **During Seminary.** Postulants who have completed or are enrolled in a homiletics course may preach in any congregation of the Diocese with an invitation from the Member of the Clergy or other person exercising oversight of the congregation.

Preaching License

Students who successfully complete the diocesan preaching program (currently the Preaching Practicum) may be licensed by the Bishop to preach anywhere in the Diocese.

Exceptions not requiring Bishop's permission

1. Lay Witnesses given at the time of the sermon for one-time, occasional events such as Stewardship programs or Youth events;
2. Inter-faith or ecumenical celebrations

Who is not authorized to preach?

Unless also licensed as a Preacher, the following are not authorized to preach:

1. Worship Leaders
2. Lectors
3. Eucharistic Ministers
4. Eucharistic Visitors
5. Pastoral Leaders

EUCCHARISTIC MINISTER & VISITOR

“A Eucharistic Minister is a lay person authorized to administer the Consecrated Elements at the Celebration of Holy Eucharist. A Eucharistic Minister should normally act under the direction of a Deacon, if any, or otherwise the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith.” [Title III, Canon 4, Section 6]

“A Eucharistic Visitor is a lay person authorized to take the Consecrated Elements in a timely manner following a Celebration of the Holy Eucharist to members of the congregation who, by reason of illness or infirmity, were unable to be present at the Celebration. A Eucharistic Visitor should normally act under the direction of a Deacon, if any, or otherwise, the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith.” [Title III, Canon 4, Section 7]

Some of the basic abilities required of an EV are:

- Adapting quickly to new or unusual situations;
- Feeling comfortable in a hospital or healthcare facility environment;
- Being a good listener.

A training guide is available from the Diocese for use in parish-based instruction. A person may be licensed by the Bishop or Ecclesiastical Authority to serve as an EV upon completion of the required training and recommendation by the cleric in charge of the congregation, or in the event a cleric is not in residence, the Dean of the Convocation in which the person is to serve.

BACKGROUND SCREENING

Those in Pastoral Relationships are required to have a Background Screening including:

Eucharistic Visitor
Pastoral & Worship Leader
Catechist
Evangelist

- a. Background Screening
 - i. Candidates must complete the Criminal History Check Form (Form G) to conduct the Criminal Records Check. This form must also be completed if reference checks are to be conducted.
 - ii. A Criminal Records Check is required for people who will be working with vulnerable adults in the home of the vulnerable adult. This check must be made for any U.S. state where the applicant resided during the past seven (7) years, and other states, if any, as determined by the diocese.
 - iii. A Sexual Offender Registry Check in any U.S. state where the applicant has resided during the past seven (7) years is required.
- b. All information gathered about the candidate through Personal Knowledge and Background Screening will be carefully reviewed and evaluated to make a determination, in consultation with others as necessary, of whether or not the person is appropriate to engage in Pastoral Relationships.
- c. Criminal records checks and sexual offender registry checks will be conducted every five (5) years on person who have Pastoral Relationships. Local congregations are responsible for ensuring that this occurs by contacting the Diocesan Office to start the check.
- d. **Transfers within the Diocese of Eastern Michigan.** Persons who have Pastoral Relationships who transfer within the Diocese of Eastern Michigan who are candidates for Pastoral Relationships in the new location must undergo the same screening and selection process specified above, including obtaining an updated Criminal Records Check and Sexual Offender Registry Check if it has been more than twelve (12) months since the last check.

June 10, 2015

THE DIOCESE OF EASTERN MICHIGAN

APPLICATION FOR LICENSING LAY MINISTERS

I hereby certify that the following adult confirmed communicants are in good standing in this congregation, have been carefully chosen and prepared to serve in the ministry to which they are to be licensed, and request they be licensed as follows:

Full Name of Candidate:	Worship Leader	<u>Ministry</u> Eucharistic Minister	Eucharistic Visitor
Please print or type			
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]
_____	[]	[]	[]

Congregation: _____

Address: _____

Signature of cleric in charge: _____

Typed or Printed Name of cleric in charge: _____

Supervisor (if applying for .E.M.'s or .E.V.'s): _____

Date of Application: _____

CATECHIST

“A Catechist is a lay person authorized to prepare persons for Baptism, Confirmation, Reception, and the Reaffirmation of Baptismal Vows, and shall function under the direction of the Member of the Clergy or other leader exercising oversight of the congregation or other community of faith.”
[Title III, Canon 4, Section 7]

Prior to licensing, Catechists shall be trained, examined and found competent in the following subjects:

- The Holy Scriptures, contents and background;
- The Book of Common Prayer and The Hymnal;
- Church History;
- The Church's Doctrine as set forth in the Creeds and An Outline of the Faith,
commonly called the Catechism;
- Methods of Catechesis

Training for licensing shall be done under the direction of a cleric appointed by the Bishop or Ecclesiastical Authority. Following successful completion of training and examination in this ministry, a License may be issued at the discretion of the Bishop or Ecclesiastical Authority.

EXPIRATION

Licenses may be issued at any time and are valid until the new lectionary cycle begins on the first Sunday of Advent in Year A.

Completed applications and letters are to be mailed to:

Lay Ministry Licensing
Diocese of Eastern Michigan
924 N. Niagara Street
Saginaw, MI 48602

Revised: October 2, 1997

Revised: November 3, 2004

Revised: January 2009

LAY MISSIONER

Formation Process for Lay Missioner

A Lay Missioner is licensed by the bishop after a course of study supervised by a seminary-trained priest. The heart of the formation process is the Education of Ministry curriculum and group experience, which usually takes four years. The supervising priest acts as a mentor to supplement the EFM course work.

Ultimately the Lay Missioner is licensed for three years for each of the following:

- | | |
|------------------------|----------------------------|
| 1) Pastoral Leader | Title III, Canon 4, Sec. 3 |
| 2) Preacher | Title III, Canon 4, Sec. 5 |
| 3) Eucharistic Visitor | Title III, Canon 4, Sec. 7 |
| 4) Worship Leader | Title III, Canon 4, Sec. 4 |

The Supervising priest/mentor initially meets monthly with the aspirant for a period of a year.

During this time books are read and reported on (in writing) in areas of ministry focusing on :

1. Anglican Ethos
2. Pastoral Care
3. Parish Administration
4. Appropriate Canons
5. The Book of Common Prayer and the Conduct of Public Worship
6. Homiletics and the Use of Voice
7. The Church's Doctrine as set forth in the Creeds and the Catechism

The Supervisor/Mentor will continue to meet with the aspirant after the first year on a regular basis as determined by the Supervisor and the Bishop. Licensing may begin before the four years of EFM are completed, as long as the Lay Missioner-in-Training continues their course of work and mentoring relationship.

Before licensing by the Bishop, the aspirant will be examined by the Examining Chaplains in Practical Theology, Liturgy, and Holy Scriptures.

After the course work is complete the Lay Missioner may celebrate their new relationship with a congregation utilizing the BCP's office for the Celebration of a New Ministry.

Functions of the Lay Missioner in the Diocese of Eastern Michigan

1. The Lay Missioner is the spiritual head of the congregation. The Senior Warden is the administrative head of the congregation.
2. To lead Morning Prayer services on Sundays when a priest is not available to celebrate the Holy Eucharist. The norm in the Diocese of Eastern Michigan is the Eucharist should be conducted two Sundays a month. The Lay Missioner is in charge of getting Supply Priests.
3. To preach as needed.
4. To visit the sick and shut in and to administer pastoral care.
5. To be available to parishioners in life crisis's and transitions to administer pastoral care.
6. To prepare individuals for the sacraments of Baptism, Confirmation and Holy Matrimony. Baptism and the Blessing of a Marriage are to be administered by an Episcopal Priest (BCP, page 298 & 422). The sacrament of Confirmation is always administered by the Bishop (BCP, page 412).
7. To lead the office of the Burial of the Dead (without the Eucharist).
8. To attend vestry meetings as a lay employee of the vestry. The senior warden is to lead all vestry meetings.
9. Lay Missioners are always under the supervision of a seminary-trained priest.

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN
EUCCHARISTIC VISITOR GUIDELINES
Revised July 13, 1998

Eucharistic Visitors (EV formerly called LEV's), should be communicants in good standing of the congregation they serve. The EV should be a good listener and someone who has appropriate pastoral skills as deemed necessary by the congregation's Priest or Deacon. They should be licensed by the Bishop only upon the recommendation of the Clergy in charge of that congregation. In a congregation with an assigned Deacon, that Deacon should be responsible for the training and oversight of the EV. The term of licensing is from 1 to 3 years and renewable at the beginning of Cycle A and only upon the recommendation of the Clergy in charge of that congregation.

It is desirable that the EVs go forth from the principle Eucharist Service with communion consecrated at that service (*it is recognized that it is not always possible, therefore using the reserved sacrament during the week is permissible*) and it is recommended that the EV be accompanied by another communicant who has been at worship for that service.

The consecrated communion is to be cared for in a respectful manner and a suitable container(s) is to be used.

The EV is to schedule visits ahead of time (*except in an emergency*).

The preferred form of the service to be used is found in the pamphlet entitled "The Administration of the Holy Eucharist by Lay Eucharistic Visitors." This form allows for flexibility so the service can be tailored to the individual situation.

It is understood that visiting the sick and shut-ins is a very special ministry. Therefore, the EV should allow sufficient time with each person visited so that the presence of God is able to be shared with that person(s).

It is recommended that the EV and the congregation enter into a "Covenant" between the EV and the Supervisor (Priest/Deacon). An example of the "Covenant" is attached, page 4.12.

COVENANT
Eucharistic Visitor

Together we commit ourselves to show forth the love of Jesus Christ in ministering Christ's Body and Blood, whether at the regular services of the congregation or in extending that fellowship and communion to those unable to attend due to illness or hardship.

As a Eucharistic Visitor (EV), I will endeavor to attend all training sessions, meeting of the EVs and individual supervisory sessions. I will carry out my assignments as scheduled and will respect the confidentiality of this ministry. I will report regularly on the visits I am asked to make and will follow the "guidelines" given by my supervisor.

As Supervisor, I will make clear and specific assignments and endeavor to provide the EV with direction and helpful background information. I will be available for consultation as needed and will arrange opportunities for continuing education and for reflection upon this ministry.

Together, we will evaluate this ministry and this relationship annually or more often if desired. Together we will give thanks for this ministry and ask God's blessing upon it.

Supervisor

Eucharistic Visitor

Date: _____

EV COMMISSIONING

Commissioning should occur at the principal service and EVs may be included in the procession or may come up at the appropriate time following the sermon and the Creed. The congregation being seated, the celebrant stands in full view of the people and the Sponsor(s) and EV(s) stand facing the celebrant.

The celebrant says

Brothers and sisters in Christ Jesus, we are baptized by the one Spirit into one Body and given gifts for a variety of ministries for the common good. Our purpose is to commission in _____ in the name of God and of this congregation as Eucharistic Visitors.

Sponsor/Deacon says

I present to you nn _____ who have/has been chosen and licensed as Eucharistic Visitors.

Celebrant asks the sponsor

Are these person(s) you present prepared by a commitment to Christ our Lord, by regular attendance at worship and by the knowledge of their duties to exercise this ministry to the honor of God and His Church?

Sponsor

I believe they are.

Celebrant then says

You have been called to serve as Lay Eucharistic Visitor(s) in this congregation. Will you as long as you are engaged in this ministry, perform it with due diligence?

EV

I will.

EV then signs the Covenant while an assigned reader reads said covenant.

Celebrant then continues with;

Let us pray. (silence)

Grant almighty God, that these who administer the bread of heaven and the cup of salvation, may in love and holiness according to your commandments, serve faithfully in this congregation, and at the last come to the joy of your heavenly feast with all your saints in light, through Jesus Christ our Lord. Amen

In the name of God and of this congregation, I commission you nn _____ as a Eucharistic Visitor among us. (and give you this _____ as a symbol of your ministry).

The Eucharist then continues with the Prayers of the People and it might be appropriate for the EVs to present the bread and wine at the offertory and then possibly be sent out prior to the final blessing with these words;

In the name of this congregation, I send you forth bearing these holy gifts, that those to whom you go may share with us in the communion of Christ's body and blood. We who are one body, because we all share one bread, one cup. Amen

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN

Loans And Grants Policy

It is the policy of the Episcopal Diocese of Eastern Michigan (Diocese) to consider applications for financial assistance from any congregation in the diocese in the areas meeting the qualifying factors below. Congregations within the Diocese of Eastern Michigan have a responsibility to implement effective stewardship practices related to their mission and facilities including a provision for regular maintenance programs within their annual budgets.

For a Congregation or Ministry Center to be eligible to receive financial assistance from the Episcopal Diocese of Eastern Michigan, they must meet all of the qualifying factors listed below:

Qualifying Factors

1. Application must meet the definition of:
 - a) Repairs and/or improvements to the facility including building or associated grounds.
 - b) Repairs required to enable a facility to meet current building codes.
 - c) Improvements to a newly acquired facility to allow it to be used for its intended purpose.
2. Congregations must be current on tithes to the Diocese, or in conversation with Diocesan Council about becoming current.
3. Congregations must be current on submitting parochial reports and audit reports to the diocesan office.
4. Congregations must be current on any loans with the Diocese or third party agencies.
5. Ability to repay any requested loan must be demonstrated with the use of financial statements.
6. If a congregation has received emergency financial assistance, it doesn't exclude them from being eligible for additional financial assistance in that same year.

Mission or Maintenance Projects

Applications for financial assistance are reviewed by the Bishop's office to determine if the project is mission related. An assessment of the congregation health is completed using concepts outlined in the Mutuality, Vitality and Viability document. This document sets forth both a covenant of mutual interdependence and two sets of characteristics, one for vitality and one for viability, with the vitality characteristics organized according to the themes of *praying, learning, serving* and *growing* by which we join one another in God's mission.

Applications are then reviewed by the Finance committee and a recommendation of the amount of financial assistance must be passed by a simple majority vote before going to Diocesan Council for final approval.

Financial Assistance Limits

Congregations are required to pay at least 20% of the total cost of the project from their own funds. Financial assistance from the Diocese is available in the form of a loan, a grant, or both. The availability of funds for loans and grants is subject to the monetary balance of The Episcopal Diocese of Eastern Michigan Loans & Grants fund, the financial strength of the congregation, and the size of the project. All approved financial assistance will be paid from The Episcopal Diocese of Eastern Michigan Loans and Grants fund.

The total amount of funds available for financial assistance grants is established by Diocesan Council and incorporated within the Diocesan Office annual budget. It is recommended that up to 10% of The Episcopal Diocese of Eastern Michigan Loans and Grants fund to a maximum of

\$50,000 be made available for grants each year. Each approved grant request is eligible for up to a \$5,000 grant. Additional grants may be available at the discretion of the Finance Committee and Diocesan Council.

Any single loan request cannot exceed 10% of The Episcopal Diocese of Eastern Michigan Loans and Grants fund balance. Approved loans are subject to an interest rate of not more than 3%.

APPLICATION PROCEDURE

Financial assistance applications are classed as:

Emergency – requires action in less than thirty (30) days. A major event such as, but not limited to, the freezing of a water system and/or the failure of a heating system would qualify for an emergency loan.

Non Emergency – time frame allows for the request to come before the Finance Committee, with documentation supporting the request. After the Finance Committee has reviewed the request, at a regularly scheduled meeting, it will make a recommendation and forward the request to Diocesan Council for action.

Emergency Applications

When a need for emergency financial assistance arises:

- a) A call will be placed to the office of the Diocesan Administrator, notifying the Diocese of the need and the immediacy of that need, after consulting with a skilled tradesperson.
- b) The telephone request will be followed up with a formal written financial assistance request and a quotation for the contractor(s). The request is to be signed by any two members of the congregation's leadership. A copy of the congregation's current financial statements and budget are to be submitted with the written request.
- c) A representative of the Finance Committee, or the Diocesan Administrator on behalf of the Finance Committee, will make a recommendation to the Executive Committee of the Standing Committee for a decision.

Emergency financial assistance may be in both the form of a grant or loan. The actual amount of the grant will be determined by the Finance Committee. The term length of the loan will be determined by the extent of the emergency and size of the loan, and will be subject to the interest rate in place for "Maintenance" projects.

Non Emergency Applications

Non emergency applications for financial assistance are normally for future spending plans and should be made on the Loan/Grant Request application available from the Diocesan Administrator. The completed application is to be submitted 90 days prior to the need for funding, and will include the following:

- a) A complete description of the project for which financial assistance is requested. In addition, every effort should be made to support the request with three bids/quotations from qualified and recommended contractors and/or suppliers. The bids/quotations will include a complete description of the project and the total project cost.
- b) The applicant shall fully define its financial participation in the project. Normally, the applicant will provide a minimum of 20% of the total cost of the project.

- c) Copies of the current budget and financial statements for the congregation or ministry center.

The Bishop's office and Finance Committee will review the application, and if necessary, may request a telephone conference call with representatives of the congregation making the request. The Finance Committee will make a recommendation to the Diocesan Council as to the amount of the loan and/or grant after the Bishop's office has determined if the application is for a "Mission Project" or "Maintenance".

CERTIFICATE OF INSURANCE

Before any work may commence, all contractors/suppliers shall provide certificates of insurance naming the applicant and the Diocese of Eastern Michigan as co-insured. The certificate of insurance will indicate that all persons to be employed on the project will have worker's compensation coverage, and that the contractor has general liability insurance.

DISBURSEMENT OF FUNDS

Progress payments to the congregation or ministry center will be made in accordance with standard business terms. Other terms must be mutually agreed upon by the congregation, the Diocese and the contractor/supplier.

LOAN REPAYMENT AGREEMENT

Loan Repayment Agreements will normally be executed by all parties prior to disbursement of funds. Standard terms include:

1. Interest will begin to accrue from the 1st of the month following disbursement of funds. The interest will be calculated at the end of each calendar month.
2. Every effort will be made to complete the disbursement of the total loan amount not later than one month after approval of the loan by the Diocesan Council.
3. The first payment of principle and interest will begin approximately one month after the first disbursement of funds.

This policy will be reviewed periodically.

Approved: By Diocesan Council
Revised: August 13, 2015

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN

Marriage And Re-Marriage Policy

Please read Title I, Canons 18 and 19, of the Episcopal Church before proceeding with pre-marital instruction or agreeing to officiate at a marriage. These Canons contain the Episcopal Church's understanding of marriage; expectations of the couple and the clergy; procedures to follow if there is less than a thirty day notice prior to the marriage; and the procedure to follow if one or both members of the couple have been formerly married and are now divorced and a former spouse is still living.

Canons 18 and 19 are pastoral, and their intent is to place the authority for decision-making, as well as the pastoral care, in the hands of the local pastor. A simple reading of the present Canons might not reveal this emphasis, particularly as it relates to re-marriages (Canon I.19.3), unless one also reads the Canons in effect prior to 1974. Those canons were juridical in nature, requiring notarized affidavits, etc. and involving a complicated decision-making process under the Bishop's direction. **Under the present Canon, the clergyperson working with the couple is to consult with the Bishop and gain consent to the decision they have already made rather than obtain permission prior to making a decision.** The Bishop can be particularly helpful if the clergyperson is unsure if she/he should proceed or needs support from the Bishop not to proceed. The Standing Committee, in the absence of a Bishop, is responsible for granting consents and providing consultation and support.

We expect that you will make every effort to comply with the Canons.

1. Note that a 30-day notice to the officiating clergyperson is required before any marriage may be performed. This is to provide adequate time for pre-marital preparation. Such notice may be waived only for "weighty cause" such as a sudden call to military service or the impending death of a parent, etc. and only "if one of the parties is a member of your congregation or can furnish satisfactory evidence of his/her responsibility."
2. Note the emphasis in the Canons that both parties understand the nature of Holy Matrimony as taught by the Episcopal Church to be "a physical and spiritual union of man and woman, entered into...with intent that it be life long."

FOR RE-MARRIAGE WHERE A DIVORCE IS INVOLVED

1. Canon I.19 applies to any divorced person whose former spouse is still living. According to Canon 19, an applicant does not have to be a communicant of the church in good standing.
2. When informing the Bishop of your intention and requesting consent under Canon 19 to solemnize the marriage of divorced persons, complete and sign the "Application for Consent" form. This will constitute consulting with the Bishop as referred to in Section 3(c) of Canon 19.

Marriage And Re-Marriage Policy - Continued

3. The recommendation from the clergyperson may take one of two forms:
 - a. If, after getting to know the couple and completing the required counseling, the clergyperson has determined it is appropriate to proceed with officiating at the marriage, the "Application for Consent" form is to be completed and signed, certifying the couple's readiness for Holy Matrimony. This will include all the information the Bishop needs to provide consent.
 - b. Occasionally clergy may want to consult with the Bishop concerning some aspects of the marriage being contemplated or whether it is advisable to proceed at all. In these cases, a detailed letter inclusive of all the pertinent information is to be forwarded to the Bishop. It might best contain the following information:
 - i. Assurance that a final decree of divorce has been granted by a civil court.
 - ii. Assurance that the couple has an understanding of the nature of Christian marriage as specified in the Declaration of Consent.
 - iii. Assurance of care for the former spouse and children (if applicable).
 - iv. Assurance that marriage counseling or other efforts to reconcile were attempted in former marriage(s), (if applicable).
 - v. Exploration of issues leading to the dissolution of the former marriage(s). What is sought is awareness and understanding, not blame and culpability.
 - vi. Exploration of learning in the divorce process.
 - vii. A brief description of the pre-marriage counseling that has taken place including the number of sessions and information gathering instruments used, if any.
 - viii. A brief statement as to the nature of the clergyperson's concern or hesitancy so the Bishop may respond appropriately.
4. You will be notified that your materials have been received and consent granted.
5. A separate sheet describes the procedure to be followed by clergypersons who are seeking re-marriage after divorce.

Marriage And Re-Marriage Policy - Continued

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN **Marriages Of Clergy Policy**

Canons 18 and 19, those pertaining to marriage within the Episcopal Church, apply alike to clergy and lay persons, “any member of this Church.” There is no Canon on marriage or re-marriage dealing specifically with clergy. The need for a separate set of guidelines for clergy marriages arises from the fact that such marital unions are highly visible, and church members are likely to hold them as an example. Because of this, it is essential that a marriage involving clergypersons be mostly healthy and striving toward wholeness.

A further distinction between the marriages of laypersons and the marriages of clergy is to be found in the person of the pastor involved. The clergyperson’s chief pastor is the Bishop, who will need to be more deeply involved in a cleric’s decision to marry, remarry, or dissolve a marriage than he or she will be for the same decision regarding lay people (who will be guided by their local pastor). In the absence of the Bishop, the Dean of the Convocation and a presbyter designated by the Standing Committee together will act.

In the absence of the bishop the re-marriage of clergy, the couple, and the Dean will decide together upon the course of the proposed marital union, weighing its pastoral implications upon persons in their care and upon the entire diocesan household. Application will need to be made to the Dean by the clergyperson him/herself, or by another presbyter or transitional deacon on his/her behalf. **Application will consist of the “Application for Consent” form, and a letter requesting an interview by the Dean and designated presbyter with the cleric and the intended spouse.** The purpose of the interview is to help with the decision to grant consent for the marriage or not.

When it becomes apparent that a marriage involving a clergyperson (or two) is in danger of being dissolved, the cleric is to make the situation known to the Dean and follow his/her advice concerning counseling and divorce.

At the time of impending divorce or re-marriage of a parochial clergyperson, the Bishop may choose to meet with the Vestry or Bishop’s Committee to ascertain the possible effects of these decisions on those in the direct care of the cleric.

In the event of a second divorce and contemplation of a third (or more) marriage, the Bishop shall require extended pastoral counseling of the divorced cleric.

Approved: January 21, 1995

Revised: February, 1995

Revised: June 5, 1997

Revised: March 13, 2006

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN
Application for Consent to Solemnize the Marriage of Persons after Divorce

Before completing this form, read the guidelines regarding
the pastoral nature of the marriage canons.

1. This form is to be submitted to the Bishop as part of the consent process required by Canons 18 and 19 of the Episcopal Church for the marriage of persons who have been divorced.
2. This form consists of three parts:
 - a. A checklist corresponding to the items that need to be considered when a marriage is solemnized.
 - b. The Certification by the Clergy person of a Couple's Readiness for Holy Matrimony.
 - c. A Request for the Advice and Counsel of the Bishop when that is desired.

To: The Bishop of the Diocese of Eastern Michigan

From: The Rev. _____ Title _____
Congregation _____ Address _____

Bride

Groom

Name _____

Name _____

Address _____

Address _____

This will be her ____ (indicate number) marriage.

This will be his ____ (indicate number) marriage.

The following issues and concerns have been addressed during pre-marriage counseling.

____ Assurance that a final decree of divorce has
been granted by a civil court.

____ Assurance that the couple has an under-
standing of the nature of Christian marriage
as specified in the Declaration of Consent.

____ Assurance of care for the former spouse
and children (if applicable).

____ Assurance that marriage counseling or
other efforts to reconcile were attempted in
former marriage(s), if applicable.

____ Exploration of issues leading to the
dissolution of the former marriage(s).

____ Exploration of learnings in divorce process.

____ Number of counseling sessions spent with the
couple

**Certification by the Clergy person of a Couple's
Readiness for Holy Matrimony**

Proposed Date of Marriage (if known) _____

I certify that this couple is ready to enter into Holy Matrimony as it is understood by the Episcopal Church
and request the consent and approval of the Bishop of Eastern Michigan to solemnize this marriage.

The Rev. _____
signed date

Request for the Advice and Counsel of the Bishop

Before solemnizing this marriage, I request the advice and counsel of the Bishop. A letter describing the
nature of my concern is attached. See section 3b of the Marriage and Re-marriage Procedures.

The Rev. _____
signed date

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN

Retired Clergy Policy

This policy is based on the following principles:

The ministry of clergy does not end with retirement.

The ministries of retired clergy are a great treasure of the Church.

Retiring clergy have a responsibility, in consultation with their Dean and/or Bishop, to prepare the way appropriately for their successors.

The Bishop and/or the Chaplain to retired clergy have responsibility to help retiring clergy identify new opportunities for ministry.

The Bishop and/or the Chaplain to retired clergy have responsibility to oversee retired clergy in their ministries.

This policy includes the following procedures:

A member of the clergy setting a retirement date shall contact the Church Pension Fund for advice about the most advantageous timing for retirement, and shall also set a date with the Bishop for a Retirement Interview. These arrangements shall be made at least six months before retirement.

The Retirement Interview includes a review of this Policy on Retired Clergy. In addition, the Bishop and the retiring clergy member shall discuss new forms of ministry for the retiring clergy member. These forms may be parochial or non-parochial, and may be quite diverse. It is recognized that clergy whose health prevents them from engaging in some public forms of ministry may still offer important ministries in such areas as lifestyle, counsel, and intercessory prayer.

Clergy retiring from congregations are expected to prepare their congregations carefully and well in advance for the changes that retirement will bring to their relationship. It is recommended that the bishop, dean, retiring cleric, and congregation be involved in planning closure. A member of the clergy approaching retirement will send out a letter to the members of his or her congregation, requesting that they not ask him or her for ministrations once retirement begins. (The retired cleric may offer ministrations to members of the congregation only if invited to do so by the priest-in-charge.) When invited by the retiring cleric, the Bishop will also address a letter to the congregation regarding the transition they are about to experience.

Clergy retiring from congregations shall be expected, upon retirement, to end any present ministerial relationship with their congregation and congregants. They will not serve in any priestly or diaconal role in their former congregations unless invited to do so by the priest in charge. They will refer all requests regarding baptisms, weddings and funerals

Retired Clergy Policy - Continued

to the clergy with pastoral responsibility for that congregation, whether those clergy are interim or permanent.

Clergy retiring from congregations shall consider, when possible, affiliating with another congregation.

The Bishop and/or the Chaplain to retired clergy shall be in regular contact with retired clergy and shall demonstrate a pastoral concern for these clergy and their ministries. The Chaplain to retired clergy, together with the Deans, will assist the Bishop in this area.

Approved: December 4, 1996
Revised: October 2, 1997

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN
Supply Clergy Licensing Policy
APPLICATION PROCEDURE

Supply clergy must submit an application to the Bishop to become licensed to officiate in the Diocese of Eastern Michigan for a period of one year as follows:

Initial application should include:

1. Evidence of a background check performed by Oxford Document Management within the last 10 years;
PLEASE NOTE FOR #1: This is only with the initial application.
2. Evidence of appropriate training in the prevention of sexual misconduct;
- ~~3.~~ A signed acknowledgment of having read the diocesan misconduct policy;
4. Clergy who are not canonically resident shall provide a letter of recommendation from their Bishop. Clergy who are not known to the Bishop shall arrange for a time to meet with the Bishop.

The annual renewal application shall include:

1. A letter requesting renewal;
2. Any elements not completed with the initial application;
3. A report on your activity during the previous year.

Licensed clergy who are resident in the diocese and are acting as supply are expected to be full participants in the clerical life of the diocese. This includes convocation clericus meetings, diocesan conventions, and clergy conferences. Clergy not resident in this diocese will be notified about these events and will always be welcome to participate.

It is the policy of the Diocese of Eastern Michigan that all clergy who officiate within the diocese be ordained and in good standing in the Church. For a retired or resigned cleric to be in Good Standing the following conditions must be met:

1. Must be residing in and attending an Episcopal congregation.
2. Must report to their bishop annually of priestly activities.
3. Must be in faithful communion with their Bishop and their Diocese.

This means:

- a. That the cleric is in the communion with the bishop and subject to his/her authority.
- b. That under no circumstances will the cleric seek to lead people out of the Episcopal Church.
- c. That the cleric participate in “the Councils of the Church” (Diocesan Convention, Clergy Conferences and Clericus meetings)

(See Title III, Canon 9.3(e); and Title I, Canon 6.2. (2003 National Canons) and BCP, pp. 526, 531-2.

The Bishop’s office will maintain a list of licensed clergy for use by Congregations in arranging for supply clergy. Congregations may use those clergy who are on the Bishop’s list. In the event of an emergency, if a licensed supply cleric is not available, the Bishop or the Dean may grant temporary permission for an unlicensed priest to officiate for a specific occasion.

Clergy officiating in a diocese other than their diocese of canonical residence are required to receive permission from the Bishop of that diocese. A visiting cleric shall be defined as one who is in the diocese temporarily (up to 60 days) to officiate at a Eucharist, baptism, wedding, funeral, or other special event. The congregation hosting a visiting cleric has the responsibility to assure that the person is ordained and is in good standing and to notify the bishop of the person’s presence in the diocese.

The four Episcopal Dioceses in the State of Michigan mutually recognize the licensed clergy from the other three dioceses. Clergy in Good Standing from the other three Michigan Dioceses may function in this diocese as long as all of the conditions stated in this policy are met.

Approved: June 5, 1997
Revised: October 2, 1997
Revised July 8, 2004
Revised December 9, 2004

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN
Travel Policy

It is the policy of the Diocese of Eastern Michigan to reimburse reasonable and necessary expenses incurred during pre-approved travel on behalf of the Diocese.

The Administrator may approve travel and reimbursement requests, which are covered in the budget.

THE EPISCOPAL DIOCESE OF EASTERN MICHIGAN

Continuing Education

Exempt lay and clergy employees will be granted up to 10 days with pay per year for continuing education. One-half of the ten-day period for continuing education should relate to the development of their faith communities vision development. Employee and employing unit will mutually decide on a plan of action to be implemented during the employee's absence. Substitute supply costs are to be covered by the employing unit.

Policy on Continuing Education for Clergy and Lay Professionals

Continuing education for clergy and lay professionals is to be encouraged as normal, healthy, and necessary. In particular, Eastern Michigan supports a linkage between clergy continuing education and the specific needs and mission of each cleric's congregation or other ministry. The culture of the diocese recognizes the importance of this linkage in several ways:

Continuing education is a standard agenda item for the monthly meetings of the bishop and deans.

Deans and their clergy discuss continuing education on a regular basis in Clericus meetings.

Continuing education time and money are addressed in negotiating new clergy letters of agreement.

Clergy and lay professional continuing education are discussed during visitations of congregations.

The diocese sponsors educational events that, in addition to their other purposes, constitute continuing education for clergy and lay professionals.

These ways, together with others, constitute a framework for continuing education that recognizes both the need for considerable variety and freedom and the grassroots character of this diocese.

Continuing Education for clergy should usually be seen in the context of the Diocesan Vision. Other things to keep in mind:

1. Accountability and Reporting:

- Annual report form mailed to the Diocesan Office with the Annual Parochial Report (*Please see next page for a copy of this report*).
- Deans work with their clergy and lay professionals in designing their continuing education projects.
- Annual reports are kept in the employees Diocesan File and become a part of their file for future employment opportunities.

2. Ownership:

- Clergy and Lay Professionals should share in the development of the standards and accountability procedures.
- Continuing Education is for the good of the Church and for the development of the Church's leaders.

3. Funding should be available from:

- The employee's congregation or faith community.
- The Convocation.
- The Diocese (limited)
- Granting agencies.

CONTINUING EDUCATION ANNUAL REPORT

Name:

Address:

Telephone:

Email:

1. Report of the previous year's work (use additional pages, as may be necessary).

BOOK/ARTICLES/READ: (Editorial comments on the items may be included).

SEMINARS, CONFERENCES, OTHER EDUCATIONAL EVENTS: (Title, date, place)

COURSES TAKEN AND COMPLETED/IN PROGRESS: (Title, dates, place)

OTHER CONTINUING EDUCATION ACTIVITIES:

ACTIVITIES/ROUTINES FOR SELF-CARE: (Exercise, spiritual direction, play, annual physical).

TOTAL EXPENSE OF YOUR CONTINUING EDUCATION:

SOURCE(S) OF FUNDING:

2. Continuing Education Plan for the coming year:

Please give the components of your plan and the rationale for each. Please list separately activities that you see as directly related to your current ministry, activities related to areas of ministry you wish to develop, and activities pursued because they are interesting.

DEACON'S EXPENSES

Updated June 2008

Section #7: Employment and Church Pension Fund Eligibility

Most deacons will not fall into the category of Employment and Church Pension Fund Eligibility. The majority of deacons are educated through a program of the Diocese as vocational deacons.

Vocational deacons are non-stipendiary, seeking income outside of their vocation. With the Bishops advance permission many deacons have jobs outside the congregation. Many work as chaplains, counselors, or are in some form of community work. Deacons should be reimbursed for their expenses, and be provided with a discretionary fund (see #8 for clarifications on both).

Section #8 Expense Reimbursement

Deacons are non-stipendiary staff (unless employed by a parish or church organization for a role other than that of deacon (see #7 above), but being a deacon should not be a financial burden. The church should set up an Accountable Reimbursement plan for the deacon's business expenses.

To be classified as having an accountable reimbursement plan the allowance arrangement must comply with the follow rules:

- Expense must have a business connection
- There must be adequate accounting of expenses (congregational, convocational and diocesan)
- Excess reimbursement must be returned
- Reimbursements are not made out of salary reduction

If the church doesn't have an accountable reimbursement plan set up, now would be a good time to do that. Without an accountable reimbursement plan the expense account/reimbursement may be taxable income to the deacon.

With an accountable reimbursement plan the Deacon can be reimbursed for mileage in one of two ways: 1) If they are paid as an employee or given a stipend, the mileage is reimbursed at the employee rate and not reported on the 1099 Misc; 2) If they do not receive any compensation for a task, they are treated as a volunteer and would receive the reimbursable mileage rate of \$0.14 per mile. They may also receive the IRS rate for employees, but must report the difference on an IRS Schedule C (EZ) with the IRS for tax purposes. A 1099 Misc would be sent only if the annual reimbursement exceeded \$600.00.

The congregation the deacon is connected with should also supply the deacon with a discretionary fund (to relieve the poor of the parish and larger community). This fund and the contributions to it are non-taxable, unless the deacon has the authority to "draw upon it at anytime" for his or her own personal use. However, this should never be the case. Open the account in the church's name with the deacon as signing authority. The fund should be audited annually along with the church's other accounts.

ACCOUNTABLE REIMBURSEMENT PLAN

May 16, 2006

The following resolution was duly adopted by the Standing Committee of The Episcopal Diocese of Eastern Michigan at a regularly scheduled meeting held on May 11, 2006, a quorum being present.

Whereas, income tax regulations 1.162-17 and 1.274-5T(f) provide that employees need not report on their tax return expenses paid or incurred by them solely for the benefit of their employer for which they are required to account and do account to their employer and which are charged directly or indirectly to the employer; and

Whereas, income tax regulation 1.274-5T(f) further provides that an adequate accounting means the submission to the employer of an account book, diary, statement of expense, or similar record maintained by the employee in which the information as to each element of expenditure (amount, date and place, business purpose, and business relationship) is recorded at or near the time of the expenditure, together with supporting documentary evidence, in a manner which conforms to all the "adequate records requirement" set forth in the regulation; and

Whereas, the Church desires to establish a reimbursement policy pursuant to the regulations mentioned above; be it therefore

Resolved, that the Church hereby adopts an "accountable reimbursement plan" pursuant to the income tax regulations 1.162-17 and 1.274-5T(f) upon the following terms and conditions:

1. Adequate accounting for reimbursed expenses. Any person employed by the Church (hereafter referred to as "employee") shall be reimbursed for any ordinary and necessary business and professional expense incurred on behalf of the Church, if the following condition are satisfied: (1) expenses that have a explicit business connection and are within the parameters of our approved operating budget; (2) the employee documents the amount, date, place, business purpose (and in the case of entertainment expenses, the business relationship of the person or persons entertained) of each such expense with the same kind of documentary evidence as would be required to support a deduction of the expense on the employee's federal tax return; and (3) the employee substantiates such expenses by providing the church treasurer with an accounting of such expenses no less frequently than monthly (in no event will an expense be reimbursed if substantiated more than 60 days after the expense is paid or incurred by an employee). Examples of reimbursable business expenses include local transportation, overnight travel (including lodging and meals), entertainment, books and subscriptions, education, vestments, and professional dues. Under no circumstances will the Church reimburse a employee for business or professional expenses incurred on behalf of the church that are not properly substantiated according to this plan. Church and staff understand that this requirement is necessary to prevent the Church's reimbursement plan from being classified as a non-accountable plan.

2. **Excess reimbursements.** Any Church reimbursement that exceeds the amount of business or professional expenses properly accounted for by an employee pursuant to this plan must be returned to the Church within 120 days after the associated expenses are paid or incurred by the employee, and shall not be retained by the employee.

3. **Reimbursements not funded out of salary reductions.** Reimbursements shall be paid out of Church funds, and not by reducing paychecks by the amount of business expense reimbursements.

4. **Cellular phones and personal computers.** The Church will not reimburse cellular phone or personal computer expenses of an employee who is considered as an employee for federal income tax reporting purposes unless the employee's use of a cellular phone or personal computer (each referred to below as "equipment") meets the following two tests:

(1) *Convenience of the employer.* Use of the equipment must be "for the convenience of the employer." This means that the employee cannot perform his or her job without the equipment. The fact that the equipment enables an employee to perform his or her work more easily and efficiently is not enough. Further, it must be demonstrated that computers and telephones available at the Church are insufficient to enable the employee to properly perform his or her job.

(2) *Condition of employment.* Use of the equipment must be required as a "condition of employment." It is not necessary that the Church specifically require use of the equipment. On the other hand, it is not enough that the Church merely states that use of the equipment is a condition of employment.

5. **Tax Reporting.** The Church will not include in an employee's W-2 form the amount of any business or professional expense properly substantiated and reimbursed according to this accountable plan, and the employee should not report the amount of any such reimbursement as income on Form 1040.

6. **Retention of Records.** All receipts and other documentary evidence used by an employee to substantiate business and professional expenses reimbursed under this plan will be retained by the Church.

7. **Guidelines for Claiming Reimbursement.** This accountable plan follows the guidelines for claiming reimbursement for various types of travel and other business-related, out of pocket expenses" as articulated in the *Manual of Business Methods in Church Affairs* © 2000 by The Domestic and Foreign Missionary Society of the Protestant Episcopal Church in the USA. Examples of acceptable reimbursement requests can be found in the Appendix section of the above named manual.

Attest: _____
Senior Warden

Employee Read and Signed Date

Episcopal Diocese of Eastern Michigan Diocesan Credit Card Policy

The purpose of this policy is to provide appropriate controls over diocesan funds in order to maintain the trust of those who make possible our common work. It is a necessary responsibility of our stewardship. In addition the reporting of certain details is a requirement of the Internal Revenue Service in the determination of taxable vs. non-taxable income for employees. These are detailed in our policies for an “Accountable Reimbursement Plan”.

When using your diocesan credit card the following procedures will apply:

- Cards are to be used only for the purchase of goods and services for use by the organization. Items purchased must be attributed to a budget line item. If there is a question as to whether there are sufficient funds in a particular line item to pay for a purchase, then the Diocesan Administrator should be consulted before the purchase is made.
- In all cases, receipts for purchases over \$75 must be turned into the Financial Manager indicating what was purchased. If a receipt doesn't accompany purchases over \$75, the expense will be considered taxable income to the purchaser. For items under \$75 all reasonable effort must be made to supply a receipt.
- No charges for personal use shall be made on Diocesan cards. Any personal expenses that are accidentally charged to your Diocesan credit card, upon discovery by the employer or employee, should be reimbursed to the Diocese immediately. Frequency of “accidental use” may result in loss of credit card privileges.
- The only person entitled to use the credit card is the person whose name appears on the card and/or the person who is given your credit card account number to process your transaction. You are not to lend your card or give out your account number to another person for use under any circumstances.
- When using your credit card for online purchases, a printout of the confirmation you receive for your purchase is acceptable as a receipt.
- Staff member is responsible for the use of their charge card and also the notifying immediately the Financial Manager of any loss or theft of card.

I certify that I have read, understood, and will comply with the policy as described above.

Cardholder

Date