

The Episcopal Diocese of Georgia



Policy Manual

Michaelmas 2013

Preface

The policies herein supplement the policies formally established by the Constitution and Canons of The Episcopal Church, the Episcopal Diocese of Georgia, and its Diocesan Convention and Council. This manual is available as an online resource only and may be printed for local use.

These other policy manuals are also available on the Diocesan website:

The Bishop's Customaries (Ordinations & Visitations)

Clergy Handbook

Ordination Handbook

Transition Handbook

Diocesan Constitution & Canons

The Constitution and Canons of The Episcopal Church

Contents

I. Clergy	1
A. Clergy Compensation	1
B. Housing	1
C. Travel	1
D. Pension	1
E. Job-Related Expenses	2
F. Absence with Pay	2
G. Discretionary Fund	2
H. Supply Clergy	2
I. Clergy Divorce-Remarriage	2
J. Letters Dimissory	2
K. Involuntary Termination	2
L. Clergy Conferences	3
M. Clergy Continuing Education	3
N. Mandatory Clergy Training	3
O. Clergy Peer Coaching	3
P. Types of Priestly Service	3
Q. Annual Renewal of the License to Officiate (LTO)	4
R. Professional Ethics Concerning Former Parishioners	4
S. Electronic Communication & Social Media	4
II. Laity	5
A. Diocesan Lay Employees	5
B. Licensed Lay Ministers	6
C. Remarriage in the Church after Divorce	6
III. Congregations	6
A. Convocations	6
B. Parish Register	6
C. Parochial Reports	6
D. Clergy Compensation Reports	7
E. Audit Reports	7
F. List of Congregational Officers	7
G. Delegates to Diocesan Convention	7
H. Mission Wardens & Reports	7
I. Episcopal Visitations	7
J. Calls and Vacancies	7
K. Congregational Tithing to the Diocese	7
L. Special Offerings	8
IV. Finance	8
A. Auditing Procedures	8
B. Fidelity Bond	8
C. Group Medical Insurance	8
D. Worker's Compensation	9
E. Travel Expenses	9
F. The Diocesan Corporation	9
G. Alienation or Encumbrance of Property	9
V. Miscellany	10
A. Alcohol Use	10

B. Camp & Conference Center (Honey Creek)	10
C. Clergy Cottage	10
D. Diocesan Holidays	10

I. Clergy

A. CLERGY COMPENSATION

Diocesan Council annually sets the minimum compensation standards for stipendiary clergy based on clergy training and experience and the size of the congregation. The reported norm for compensation includes salary, housing (or allowance), and SECA supplement. Clergy are considered self-employed for Social Security purposes and are required to pay Social Security taxes at the self-employed rate. Vestries are required to pay their clergy the difference (7.65%) between the SECA taxes paid by a self-employed person and that contributed by an employer.

B. HOUSING

Rectors/Vicars are provided either with a house or a housing allowance. The housing provided should be comparable to that occupied in the area by similar professionals. If housing is provided, the church is responsible for utilities, repair, and maintenance. The congregation's budget will cover such expenses. In the case of a housing allowance, it should cover mortgage payments, taxes, utilities, maintenance, repair, and decoration. Vestries must adopt a housing resolution annually (an IRS mandate) designating a portion of the clergy salary as housing allowance. The Diocesan office has a sample housing resolution that conforms to the IRS code.

C. TRAVEL

All travel costs, by both public and private modes, incurred in the performance of clerical duties, will be reimbursed based on IRS guidelines. The particular needs of the church determine the allowance amount. Clergy are called upon to serve the Church at diocesan and civic levels. The vestry must account for these additional commitments when establishing the annual travel allowance. When clergy are requested by the Bishop to represent the Diocese elsewhere, the Diocese will reimburse them for travel expenses incurred through the annual diocesan budget.

D. PENSION

Congregations are required by canon to pay the Church Pension Group (CPG) assessment for stipendiary clergy. The Pension Fund assessment is based on the following formula: $18\% \times \text{Total of Salary (including SECA adjustment) + Housing (Allowance or value of church-owned housing)}$. These assessments pay for a defined benefit pension, disability insurance, survivor's income benefit, and term life insurance.

Pension Fund contributions must be made in a timely manner. If they fall more than six months in arrears, the benefits available could be in jeopardy. If clergy die during such an arrearage period, their beneficiaries would not receive death benefits and would receive a smaller monthly stipend.

Since the pension received through the Church Pension Group is not wholly adequate for retirement, the Diocese urges vestries, after a clergyperson's fourth year of service, to place 10% of their annual stipend in a tax-sheltered investment program under the provisions of Section 403 (b) of the IRS Code or as a part of an IRA. Such funds are a part of total remuneration when establishing the amount of SECA due.

E. JOB-RELATED EXPENSES

Congregations are required to reimburse clergy for job-related expenses through their annual operating budgets. Clergy are required to stay within this budgeted amount or seek Vestry action to expand it.

F. ABSENCES WITH PAY

The clergy should receive:

- Not less than one 24-hour period off per week.
- Four week's vacation/year (pro rated in the first year).
- At least two weeks/year for continuing education or professional training.
- Two weeks annual military leave while serving a military reserve/guard unit.
- A sabbatical based on two weeks/year served taken after five years of service.

G. DISCRETIONARY FUND

Congregations provide a discretionary fund for their clergy at the clergy's pastoral discretion. Use of this discretionary fund must follow the Church's Canons that constrain its use for particular means.

H. SUPPLY CLERGY

Diocesan Council annually sets Supply Clergy standard compensation. Currently, when clergy serve as supply priests, \$150 per day is the honorarium for one Sunday liturgy with \$50 for each additional Sunday or weekday liturgy. Other honoraria for Supply Clergy: Funerals \$150 plus \$50 for graveside (\$100 for graveside only); Weddings \$250 (including rehearsal). All travel expenses are also reimbursed using the rate established annually by the IRS.

I. CLERGY DIVORCE-REMARRIAGE

The Bishop will deal with each case pastorally, as needed, and in accordance with the Canons of the Church.

J. LETTERS DIMISSORY

New clergy serving full-time cures should request Letters Dimissory for canonical transfer between dioceses. The canons specify that Letters Dimissory must be accompanied by a certification that the Church Pension Fund assessment has been paid in full. The Diocese does not accept requests for Letters Dimissory for retired clergy from other dioceses or for clergy who are serving in interim positions unless these clergy are engaged in full-time stipendiary ministry, have expressed a desire to remain in the Diocese, and who have shown excellence in their ministry while in the Diocese. The Bishop makes this determination in each case.

K. INVOLUNTARY TERMINATION

Pastoral situations arise that necessitate a clergy's removal from his or her cure through proper canonical processes. The Bishop will offer a transition period during which the clergy is relieved of pastoral responsibilities. The congregation involved will continue its financial obligations to the clergy during this transition. During this time, the Bishop, the

clergy, and the vestry will consult and reach a final agreement on the amount and extent of the vestry's financial obligation.

L. CLERGY CONFERENCES

The Diocese has two Clergy Conferences annually. The conferences are mandatory for all diocesan stipendiary priests (non-stipendiary priests, retired priests, and deacons are welcome to participate as well). Congregations will provide adequate financial support for all stipendiary priests to participate.

M. CLERGY CONTINUING EDUCATION

The Diocese has a Clergy Continuing Education Fund that supplements funds from the local church. Annually, clergy can receive up to \$500 from this fund through a written request to the Bishop.

N. MANDATORY CLERGY TRAINING

The Bishop requires that all new priests coming into the Diocese either through ordination or canonical transfer participate in three ongoing training programs: The Church Development Institute, an eight-weekend over two years church leadership training program; The Conflict Management Workshop, a five-day laboratory training focusing on the use of self in conflict situations; and, The Emotional Intelligence Workshop, a five-day laboratory training that helps participants develop this needed skill. The dates for these are published in advance and the Diocese covers much of the cost. The remaining cost should be covered by congregational continuing education allowances. The Bishop expects priests to either have completed or matriculated in these within the first two years of arriving in the Diocese. This training is in addition to the Safeguarding God's Children and Anti-Racism training mandated by the Canons of the Episcopal Church.

O. CLERGY PEER COACHING

The Diocese offers peer coaching to all clergy and to some lay leaders who have responsibility in congregations where there is no regular priestly oversight. The International Coaching Federation (ICF) has certified all our Clergy Coaches. Clergy who desire coaching should contact the Reverend Walter Hobgood, the priest who oversees Clergy and Lay Leadership Development. Newly ordained clergy, Diocesan clergy in new assignments, and clergy who are new to the Diocese of Georgia may be required by the Bishop as part of their Letter of Agreement to have a peer coach assigned to them for a designated time period. Fr Hobgood will make every effort to pair individuals with a coach of their choosing. After consulting with the Bishop, he makes assignments based on experience, affinity, and other contextual issues.

P. TYPES OF PRIESTLY SERVICE

There are a variety of priests serving in the Diocese. Some priests have had three years of residential training at a seminary and have received Masters of Divinity (MDiv) degrees. Other priests have had some seminary training by taking an "Anglican" year at a seminary or through a Masters (not MDiv) program completed primarily online. Still others have been alternatively prepared for the priesthood through a combination of guided reading, residential work at a seminary, training workshops, and parish internships. For simplicity purposes, we refer to the first category as "MDiv Priests" and the other categories as "Bi-

vocational Priests.” The norm for Bi-vocational Priests is for them to derive their income primarily from secular employment or secular retirement income. The norm is that they will not serve in full-time, paid stipendiary positions in the Diocese unless it is in an interim situation. They may serve as part-time assistants, part-time vicars, or as supply clergy. While this is the norm, special circumstances may occur and the Bishop will treat these special circumstances on a case-by-case basis.

Q. ANNUAL RENEWAL OF THE LICENSE TO OFFICIATE (LTO)

Every priest who does not have a regular stipendiary cure, retired or not, either canonically resident in this Diocese or canonically resident in another diocese, must complete a form each June and submit the form no later than July 1 each year. This form accounts for their sacramental acts in the previous year, and, by signing the form, the priest requests a LTO for the coming year. Those not fulfilling this requirement will not be licensed for the year.

R. PROFESSIONAL ETHICS CONCERNING FORMER PARISHIONERS

Former parishioners sometimes contact clergy for counsel or sacramental ministry. Clergy can strengthen their successor’s ministry by gently declining such requests. On occasion clergy may return to a former parish for a wedding, funeral, or other event. At such times, clergy must contact the current clergy for permission. If there is any disagreement about this between the clergy, then the Bishop’s office will resolve it.

S. ELECTRONIC COMMUNICATION & SOCIAL MEDIA

Electronic communications should be professional and respectful to the recipient and others who might read them. Clergy and Lay employees in the Diocese are prohibited from sending any communication from electronic devices owned by the Diocese or a congregation of the Diocese that contain obscene, profane, sexist, or racist language or images. Clergy and lay employees, using church email addresses or church-sponsored social media, may not post opinions or statements that are contrary to the Doctrine, Discipline, or Worship of The Episcopal Church.

Specific recommendations for use of email, texting, Twitter, etc.:

1. Since these can be misinterpreted in tone and nuance, they are best used for basic factual information, such as meeting times, agendas, sharing documents, etc.
2. These communication forms are not appropriate for pastorally sensitive or emotionally charged issues, which are best reserved for face-to-face communication.
3. Users should consider the ramifications of their message before sending or replying to a message.

Specific recommendations for Social Media and Networking:

1. Congregations should set strong privacy settings on any social media to shield both adult and youth members from viewing content that may be inappropriate.
2. Clergy’s individual social media should be used to interact with friends, families, and peers. While they may accept such requests, clergy should not submit “friend” requests to those to whom they minister. The power disparity may not give the person the ability to decline such a request. Likewise, clergy should consider the impact of declining a “friend” request from one to whom they minister, because this could create confusion and tension in the pastoral relationship.

3. Clergy who wish to connect with parishioners through social media should set up a group account that all parishioners may join.
4. Clergy who work directly with youth should establish church-sponsored online groups as a way of communicating with youth members.

Specific recommendations for interacting with children and youth:

1. Closed groups, but not hidden groups, should be used for church youth groups.
2. These groups should have at least two unrelated adult administrators as well as at least two youth administrators.
3. Adult leaders and youth in the group should together create behavioral covenants for what is appropriate/inappropriate for their online youth group.
4. Any material on an online group that raises suspicion that a child or youth has been or will be abused, neglected, or exploited should be immediately reported to the clergy and/or DFCS. If this material is on a church-related site, it should be hard copied for church records and then removed after consulting with DFCS or the police. Other inappropriate material that does not rise to the level above still should be removed from the site.
5. Any content shared on church-related sites or within church-related online groups that details inappropriate behavior (outside the boundaries of established group behavioral norms) should be addressed directly by adult leaders and parents.
6. All church-related youth online groups must be open to parents of current youth members to join.
7. Former adult leaders and youth members, who due to departure, removal from a position, or because they are no longer eligible having “aged-out” of the youth group, should be removed from the online group.

II. Laity

A. DIOCESAN LAY EMPLOYEES

The Diocesan Convention adopts an annual budget that sets salaries for all diocesan lay employees based on the recommendation of the Bishop, Diocesan Council, and the Finance Committee. Benefits provided lay employees are:

Group Medical Insurance – The Diocese pays the premiums for lay full-time employees at the same rate as for clergy full-time employees.

Life Insurance – The Diocese pays the premium for a \$30,000 term life policy for all full-time lay employees.

Pension - The Diocese provides a 10% contribution annually to the defined contribution lay pension plan in compliance with 403(b) of the IRS.

Vacation – Full time employees are entitled to paid vacation as follows: Two weeks during the first four years; three weeks through the ninth year; four weeks beginning in the tenth year. The Bishop may increase vacation benefits as part of his annual Letter of Agreement with each staff person.

Other Paid Absences – The Diocese permits an employee up to ten days paid absence for illness or a family death or crisis.

B. LICENSED LAY MINISTERS

The Bishop authorizes the following Lay Minister licenses. All licensees are authorized to serve under the direction of a member of the Clergy:

Pastoral Leader – exercises pastoral or administrative responsibility in a congregation under special circumstances defined by the Bishop.

Worship Leader – regularly leads public worship.

Preacher – preaches in congregations.

Eucharistic Minister – administers the sacrament at the Holy Eucharist.

Eucharistic Visitor – takes the sacrament following the Holy Eucharist to those who for reason of illness or infirmity were unable to attend the Celebration.

Evangelist – proclaims the Gospel through words and actions in a ministry under the direction of the Bishop.

Catechist – prepares persons for Baptism, Confirmation, or Reception into the Church.

C. REMARRIAGE IN THE CHURCH AFTER DIVORCE

Please refer to the Bishop's policy on the Diocesan website. This policy is congruent with the Canons of the Church. The petition process found on the Diocesan website must be completed in full before the Bishop can consider the request for remarriage in the Church.

III. Congregations

A. CONVOCATIONS

The diocese is divided into six convocations. The Bishop appoints a priest as the Dean of each convocation. These appointments are at the Bishop's discretion and have no term limit. Convocation activities may include Christian formation, youth ministry, clergy mutual support, Episcopal Church Women, and convocation confirmations. Diocesan canons specify that Convocation Councils shall meet at least annually. Each Convocation has three representatives on the Diocesan Council: One clergy and two laity. One member is elected at Convocation Council annually for a three-year term.

B. PARISH REGISTER

The parish register is an important document. It is the responsibility of the parochially assigned clergy to maintain it accurately. All entries must be in ink. All applicable blanks must be completed in legible handwriting, using full names.

C. PAROCHIAL REPORTS

Parochial reports summarizing the ministerial and financial data of a given year in a congregation's life are canonically required to be submitted no later than March 1 following the close of the calendar year. Instructions and further information on the parochial report may be found at <http://dfms.org/page/parochial-report>

D. CLERGY COMPENSATION REPORTS

Before the first day of the calendar year, vestries must submit a report to the Diocese the compensation for their clergy in the coming year. At the time the clergy compensation reports are submitted, lay employee salaries should also be reported.

E. AUDIT REPORTS

A report of the completion of a parish/mission audit must be submitted annually to the diocesan office by September 1.

F. LIST OF CONGREGATIONAL OFFICERS

The Diocesan office maintains a list of parish/mission elected and appointed officers. This list must be sent to the Diocese as soon as they have been elected or appointed for the year.

G. DELEGATES TO DIOCESAN CONVENTION

Diocesan Canons specify that lay delegates and alternates to Diocesan Convention shall be elected no later than September 15 following the adjournment of the previous convention and the Secretary of Convention notified of the election no later than October 1 following adjournment of the previous convention. Those elected comprise part of the local Convocation Council and assume this responsibility as well.

H. MISSION WARDENS & REPORTS

The Bishop appoints the Senior and Junior Wardens of mission congregations. The Vicar/Priest-in-Charge submits to the Bishop the names of those nominated. Mission vestries must keep accurate meeting minutes and financial statements and send them each month to the Bishop.

I. EPISCOPAL VISITATIONS

The Bishop's visitation schedule provides for his annual pastoral visitation to each congregation. About three weeks prior to his scheduled visitation the rector/vicar (in the case of a vacant cure the senior warden) will receive a letter outlining the visitation schedule. The form enclosed should be completed and returned to the diocesan office promptly so that the Bishop may complete his plans. His visitation liturgy should conform to his customary found on the Diocesan website.

J. CALLS AND VACANCIES

The Bishop must be advised when a priest is being considered for a call to a parish. A priest leaving a parish should give at least 30 days' notice. The priest should advise the vestry of canonical procedures and should not attempt to influence the selection of a successor. No vestry will issue a call without the involvement of the Bishop as provided for in Canon III.9.3(3) of the national canons and Canon 3.1 and 3.2 of the diocesan canons. The Bishop appoints the vicars of all missions after consulting mission vestries.

K. CONGREGATIONAL TITHING TO THE DIOCESE

See Canon I.19 of the Diocesan Canons.

L. SPECIAL OFFERINGS

Diocesan Canon II.10 specifies that special offerings shall be taken at certain times of the year for the following:

- **Bishop's Visitation** – The undesignated offerings shall go to the Bishop's Discretionary Fund. The clergy should announce this during the Visitation.
- **Episcopal Youth and Children's Services (EYCS)** – An offering shall be taken for the EYCS on the Sunday immediately preceding or following Thanksgiving Day. The EYCS uses these funds to make grants to deserving diocesan young people for scholarships or emergency medical purposes.
- **The University of the South** – A special offering shall be taken on a Sunday in April or May for the University of the South.

Although not required by canon, congregations are urged to take special offerings for:

- **One Percent Theological Education Fund** – Each congregation is urged to give 1% of its NDBI to one or more seminaries of the Episcopal Church.
- **Episcopal Relief and Development (ERD)** – One Sunday/year is designated as Episcopal Relief and Development Sunday and a special offering is taken on that designated Sunday.

Diocesan Canons allow congregations to budget support of EYCS and the University of the South in lieu of special offerings.

IV. Finance

A. AUDITING PROCEDURES

Diocesan Canons specify that all receipts, expenditures or investments by all congregations, including guilds and groups within the congregation, and church organizations be audited and certified by a CPA or an audit committee authorized by the vestry or other governing body. The Diocesan office must receive a copy of the Audit Certification no later than September 1st following the close of the year.

B. FIDELITY BOND

The Diocese pays for and maintains a master fidelity bond through the Church Insurance Corporation that covers all parishes/missions and diocesan organizations. All persons within an organization with gross receipts of more than \$25,000 are bonded in the amount of \$25,000. Additional coverage is available at the congregation's expense through the Church Insurance Corporation.

C. GROUP MEDICAL INSURANCE

The Diocese maintains a group medical insurance program for stipendiary clergy, their families, full-time lay employees, and retired clergy. Congregations pay for this medical insurance. The Diocese pays the premiums for diocesan staff. In order to comply with the Diocesan clergy minimum compensation standard, congregations with priests or lay employees serving at least 30 hours/week are required to assure insurance coverage. For those who do not otherwise have medical insurance provided through a spouse or an existing plan such as Tri-care, this means the congregation must cover 100% of the lowest

cost plan offered. If a higher cost plan is desired, then that must be negotiated between the Vestry and the Priest.

D. WORKER'S COMPENSATION

Each parish or mission paying a salary or wages to three or more employees (including stipendiary clergy) must have Worker's Compensation Insurance by Georgia state law. The Diocese maintains a master Worker's Compensation Policy through The Church Insurance Corporation. Each parish or mission is covered under this master policy as long as it pays its premium directly to The Church Insurance Corporation.

E. TRAVEL EXPENSES

The Diocese reimburses travel expenses at current IRS rates for laity and non-stipendiary clergy when traveling beyond 50 miles from home to serve a diocesan ministry. When traveling for a Diocesan ministry, the Diocese reimburses individuals for their lodging, as requested, and for meals at a rate reasonable for the context. During the triennium preceding General Convention, Diocesan Convention escrows a designated amount in the annual budget to assist our diocesan deputation with their General Convention expenses.

F. THE DIOCESAN CORPORATION

The Diocese established a corporate entity: "The Protestant Episcopal Church in the Diocese of Georgia, Inc." Its purpose is to administer funds placed in trust for the benefit of the Diocese and its congregations. The Corporation's Officers consist of the Bishop and seven lay members elected by Diocesan Convention. The Diocesan Canons and the by-laws of the Corporation set forth the method of election and the responsibilities of the Officers. Officers report directly to the Diocesan Convention and exercise corporate power under its charter. The Diocese publishes the list of funds with a description of their purpose. All diocesan congregations and organizations can invest their funds with the Corporation.

G. ALIENATION OR ENCUMBRANCE OF PROPERTY

The Canons require the consent of the Bishop and Standing Committee for any congregation to alienate or encumber property owned by the Diocese or any congregation. Diocesan Canons require the approval of the Bishop and Standing Committee when a parish desires to incur indebtedness in excess of 150% of its average annual receipts of the previous three years (for a mission, it is in excess of 50%). Diocesan Canons require the Bishop's approval before a mission vestry incurs any liability that shall be a charge against the Diocese or the property of the mission. In the alienation of property, approval will not normally be given for a sale where any part of the sale's proceeds are for a purpose that is a normal part of the operating budget.

Prior to the Standing Committee receiving an application, the Bishop must receive a report containing:

- A map showing the exact dimensions of the property, its relation to other church-owned property; major, or satellite, business districts, together with some note of the surrounding land use (residential, industrial, commercial);
- Reasons and benefits for encumbering or alienating the property.
- Where permission to encumber is sought, the following must be submitted with the application: (1) Present communicant strength and growth trends; (2) Copy of the annual budget for the current and previous year; (3) Plan for repayment of the loan;

(4) List of other encumbrances, their terms, and the total amount for which congregation is responsible.

The Standing Committee normally meets three times per year: in January, after Easter, and in the fall. It meets at other times as needed.

V. Miscellany

A. ALCOHOL USE

No congregation will sell alcoholic beverages at any function of the congregation or any of its organizations. Serving light alcoholic beverages, without charge, at functions sponsored by a church or a diocesan organization is at the discretion of the clergy or laity in charge. When alcoholic beverages are served, non-alcoholic beverages must always be offered as an alternative in a way that is equally attractive and accessible. Any beverage or food that contains alcohol must be clearly labeled as such. In all cases, the clergy & wardens must approve the serving of alcohol prior to any church-sponsored event and must ensure that responsible adults oversee the serving of alcoholic beverages to assure its moderate and age-appropriate consumption.

B. CAMP & CONFERENCE CENTER (HONEY CREEK)

The Diocese owns and operates a camp & conference center located in Camden County. An Executive Director, supervised by the Diocesan Conference Center Commission, oversees operations. Facilities are available for conferences, workshops, parish or vestry weekends, retreats, and family recreation. During the summer the facilities are used for a summer camping program for diocesan youth.

C. CLERGY COTTAGE

The Diocese owns a cottage in North Carolina near Saluda. Clergy have priority in reservations, but lay employees may also use the cottage. It is available only from May through October. Linens are not furnished. Occupancy is normally on a weekly basis, commencing on Saturday afternoon and terminating Saturday morning. Occupants are expected to maintain the cleanliness of the house. Contact the Diocesan office to arrange for the rental of the cottage. An online calendar is kept so prospective renters can know when it is available.

D. DIOCESAN HOLIDAYS

The diocesan office will be closed on these paid holidays:

New Year's Eve & Day	Easter Monday	Veteran's Day
Martin Luther King, Jr.	Memorial Day	Thanksgiving Wednesday - Friday
President's Day	July 4	December 24-26
Good Friday	Labor Day	

The diocesan office is closed on St Patrick's Day or on the day Savannah celebrates it