CLERGY MANUAL

The Episcopal Diocese *of Texas*

March 2025

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1 - The Diocese of Texas

Diocesan Mission

We are One Church, reconciled by Jesus Christ, empowered by the Holy Spirit, called by God through worship, witness, and ministry, building the Kingdom of God together.

Somos una Iglesia, reconciliada por Jesucristo, autorizados por el Espíritu Santo, llamados por Dios por adoración, testigo, y ministerio, construyendo el Reino de Dios juntos.

Diocesan Core Values

Grounded in our response to the Baptismal Covenant and Great Commission, the churches, schools, and institutions of the Episcopal Diocese of Texas passionately hold these values:

- **Missionary Emphasis:** Making Jesus Christ known with a missionary spirit that honors our heritage of growth and expansion
- **Education and Leadership:** Forming disciples, both lay and clergy, to be effective agents of transformation
- **Meeting Human Needs:** Bringing the love of Christ to a hurting world
- **Responsive Stewardship:** Caring for and dedicating our abundant resources to the mission of the Church
- **Excellence**: Setting a standard for ministry driven by miraculous expectation

Diocesan Beliefs

This is a brief introduction to our life and faith. We live out these core beliefs through:

- Worship and parish programs
- Reaching out to the community
- Sharing our story with others
- Seeking God's love together in study and prayer
- Giving of our means and talents to the greater purpose of God's work

Diocesan Vision

As followers of Jesus Christ, we are One Church within the Anglican Communion and the Episcopal Church. All are sought and embraced in worship, mission, and ministry in a spirit of mutual love and respect.

Como seguidores de Jesucristo, somos Una Iglesia dentro de la Comunión Anglicana y la Iglesia Episcopal. Todos son llamados y abrazados en adoración, misión y ministerio en un espíritu de amor y respeto mutuo.

We are:

Youthful: Our congregations and institutions are continually renewed and revitalized through the infusion and inclusion of younger members. Children, youth, young adults, their friends, and their families find in our Diocese significant and engaging programs and ministries that inspire, inform, and support them on their Christian journey.

Multicultural: Our Diocese is enriched through intentional efforts to reflect the communities in which we live. People of diverse ethnic, cultural, and socioeconomic backgrounds find respect, dignity, and opportunity in the life and ministry of the Church.

Forming and Growing: Those seeking a deeper relationship with Jesus are nurtured and equipped to share the love of Christ in the world. They find lifelong opportunities for spiritual formation and servant leadership grounded in scripture and our historic catholic faith.

Reaching Out to Serve: Those who serve and are served are transformed. People who are in need and who struggle, find hope, care, and restoration through the outreach and justice ministries provided by the people of the Episcopal Diocese of Texas.

One Church: We are a united, vibrant, healthy, and growing community of faith. The world will recognize us as Jesus' disciples because we love one another as Christ loves us.

Regions

The Diocese of Texas is divided into four regions. Oversight is provided to the congregations in the respective region by means of the regional executive.

South Region	East Region	West Region	North Region
Convocations	Convocations	Convocations	Convocations
East Harris	Northeast	Austin	Fort Worth
Galveston	San Jacinto	Central	
West Harris	Southeast	Northwest	
		Southwest	

Regional Executives

The Rt. Rev. Hector F. Monterroso — South Region
1225 Texas Avenue
Houston, Texas 77098
713-520-6444 or 800-318-4452
hmonterroso@epicenter.org

The Rt. Rev. Jeff W. Fisher — East Region
2695 S. Southwest Loop 323
Tyler, Texas 75701
903-579-6012 or 888-579-6012
jfisher@epicenter.org

The Rt. Rev. Kathryn "Kai" M. Ryan — West Region
PO Box 2247
Austin, Texas 78768
512-478-0580 or 800-947-0580
kryan@epicenter.org

The Rt. Rev. Brian R. Seage — North Region
2009 S. Main St.
Fort Worth, TX 76104
817-534-1900
bseage@epicenter.org

Diocese of Texas Ministries

Follow the link to the Diocese of Texas website to find a list of the various boards, committees, institutions and other organizations with contact information: www.epicenter.org/diocese/governance/.

The Journal of the Annual Diocesan Council, Volumes I and II and the Directory of the Diocese of Texas are published on the diocesan website: https://www.epicenter.org/about/governance/diocesan-journals/.

Volume I includes:

Reports to Council
Pending Business from the Previous Council
Standing Committees of the Council
Reports of the Bishops
Reports of Officers of the Diocese
Diocesan Committees
Canonical Reports
Executive Board Units, Divisions, & Departments
Boards of Diocesan Institutions
Additional Reports

Volume II includes:

The Proceedings of Council
The Council's Minutes
The Bishop's Address
Reports to Council
Financial Summaries
Statistical Reports
The Directory

Diocesan Staff and Functions

BISHOPS' OFFICES

Office of the Bishop Diocesan, Houston
Houston Diocesan Center: 1225 Texas Avenue, Houston, Texas 77002, 713-520-6444 or 800-318-4452

Please contact the Office of the Bishop Diocesan directly for inquiries related to the following: the St. George Award, Eagle Scout recognition, 90th and 100th Birthday Celebrations, Lily Grant application, any TEC grants, letters of good standing, remarriage petitions, bishop's committee appointments, letters of recommendation, clergy retirement, sacerdotal reports. All inquiries should be emailed to Sara Marlatt at smarlatt@epicenter.org.

IX Bishop of Texas The Rt. Rev. C. Andrew Doyle adoyle@epicenter.org

Chief of Staff The Rev. Canon Marcea Paul mpaul@epicenter.org

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Office of the Bishop Suffragan, Austin
Austin Diocesan Center, 510 Rathervue Place, Austin, Texas 78705 (on the campus of SSW), 512-478-0580, or 800-947-0580.

Bishop Suffragan The Rt. Rev. Kathryn "Kai" M. Ryan kryan@epicenter.org

Executive Assistant to Bishop Suffragan Haley Townsend Trujillo htownsend@epicenter.org

Assistant to Commission on Ministry Ana Gonzales May agmay@epicenter.org

Office of the Bishop Suffragan, Tyler

Tyler Diocesan Center: 2695 S. Southwest Loop 323, Tyler, Texas 75701 (on the campus of All Saints' School), 903-579-6012 or 866-579-6012

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Wellness and Care Ministries / Safeguarding Team

Located at the Austin Diocesan Center on the campus of the Seminary of the Southwest, PO Box 2247, Austin, Texas 78768, 512-478-0580 or 800-947-0580, secure fax 866-898-8976.

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Technical Assistant Max Lange mlange@epicenter.org

OTHER DIOCESAN ORGANIZATIONS

Camp Allen Conference and Retreat Center

18800 FM 362, Navasota, Texas 77868, 936-825-7175, www.campallen.org.

President Allen Kight allenk@campallen.org

Episcopal Health Foundation

500 Fannin St. Suite 300, Houston, Texas 77002, 713.225.0900, www.episcopalhealth.org.

President and Chief Executive Officer Dr. Ann Barnes abarnes@episcopalhealth.org

2 - Expectations of Clergy

Expectations of All Clergy

Terminology: "Clergy"

As referenced in this manual, the term "clergy" applies to all Episcopal clergy who function in the Episcopal Diocese of Texas, whether deacon, priest, or bishop, active or retired, licensed or canonically resident, parochial or non-parochial, full-time, part-time or bi-vocational, residing within the Diocese or elsewhere.

Membership in the Clerical Order

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

Clergy Orientation

All clergy new to the Diocese will be invited to attend an orientation session at Camp Allen immediately prior to the annual Clergy Conference. This orientation is required and will be further scheduled by the Bishop on a periodic basis.

Attendance at Meetings

All active clergy are required to attend the annual Clergy Conference in October and the Annual Diocesan Council in February, as well as any called meetings of Council, except as provided elsewhere in this manual. They also are expected to attend Clericus meetings and Clergy Days, which the Bishop may schedule from time to time. Licensed clergy are requested to attend the annual Clergy Conference and are expected to attend other clergy gatherings.

Background Checks

All Clergy Canonical, Licensed or Retired, serving within the diocese in any capacity are required to have a current (within five years) background check conducted by the Bishop's Office.

The Bishop's Office conducts background checks through Oxford Document on all clergy and rechecks every five years. This is in addition to any background checks that may have previously been completed by another diocese and/or seminary. The initial background check, for all clergy including those seeking licensing, consists of a 15-year check of references and public records (driver, credit, and criminal). Subsequent background re-checks, every 5 years, will recheck public records only. If clergy leave the Diocese to serve elsewhere, a complete 15-year background check will be conducted if they return to the Diocese after five years to serve in any capacity.

The only clergy who may be exempted from these requirements are retired clergy who certify to the Bishop that they are completely retired and do not exercise their ordained ministry in any context. *(See Appendix D - This form will not affect the status of your Financial Retirement Plan.)*

Sexual Misconduct and Sexual Harassment Prevention

All members of the clergy are expected to be conversant with the following sets of policies: *Safeguarding God's Children: Policies for the Protection of Children and Youth, Safeguarding God's People: Policies for Safe Ministry with Adults*, and *Safeguarding God's People in the Workplace: Policies Preventing Sexual Harassment*. All clergy are expected to articulate, support, and educate others about these policies in their local setting.

All members of the clergy are required to satisfy the diocesan Safeguarding training requirements for clergy, including one three-hour Live Engagement training with the Canon for Wellness and Care that must be repeated every five years. These requirements are set out more fully in an Appendix to the *Policies for the Protection of Children and Youth* and to the *Policies for Safe Ministry with Adults*.

Members of the clergy who have received Safe Church, Safe Communities training in another diocese may receive credit for training that is current and *duplicates* what is required by the Diocese. Clergy applying for licensing will be fully licensed only after Safeguarding training is complete. Those who have been previously licensed will not have their license renewed unless they continue to meet this requirement. For information on registering for Safeguarding training, contact Danielle Tatro, Administrative Assistant for Wellness and Care (dtatro@epicenter.org, 512-609-1882).

The only members of the clergy who are exempt from these training requirements are retired clergy who certify to the Bishop Diocesan that they are completely retired and do not exercise their ordained ministry in any context. (See Appendix D.)

Safeguarding training may be counted as Professional Continuing Education Units.

Anti-Racism Training

Clergy who have entered the Diocese since 2010 are required by the Bishop to have completed seven hours of diocesan anti-racism training prior to licensing or within 9 months of canonical residency. The required training, "Lighting the Path: A Road to Antiracism in EDOT," specifically addresses the history of racism in Texas and in our diocese. For this reason, other anti-racism trainings are unlikely to satisfy the EDOT requirement. If you have questions, contact the Rev. Canon Sarah Gaventa, Canon for Wellness and Care (sgaventa@epicenter.org, 512-609-1876).

Training is offered approximately four times per year, although additional trainings may be added according to demand. The training currently consists of two 3.5-hour Zoom sessions, one week apart. The seven hours of training count as three Personal and four Professional Continuing Education Units. For information on registering for training, contact Danielle Tatro, Administrative Assistant for Wellness and Care (dtatro@epicenter.org, 512-609-1882).

Continuing Education

Canonically, members of the clergy must meet an annual continuing education requirement that varies depending upon whether they are fulltime or parttime, stipendiary (paid) or non-stipendiary (unpaid). Clergy who are both fulltime and stipendiary are expected to earn 24 hours of Continuing Education Units (CEUs) each year, with a minimum of three hours each in the following competencies: Personal, Theological/Academic, and Professional. All other members of the clergy are expected to earn 12 CEUs each year, with a minimum of three hours in each competency. Clergy who are fully retired from ordained ministry (including supply work) are encouraged but not required to earn CEUs. Every member of the clergy receives time off each year for the purpose of fulfilling their continuing education requirement. The time and monetary allowance for fulfillment of this requirement will be stated in the Letter of Agreement. Clergy who are canonically resident but who live and work outside the Diocese are exempt from this requirement.

CEUs are reported annually through the Diocesan website. The reporting year begins on September 1 and ends on August 31. Reports are due by September 30. The requirements and more information on what constitutes a Continuing Education Unit can be found on the diocesan website. Contact the Rev. Canon Sarah Gaventa, Canon for Wellness and Care, with questions (sgaventa@epicenter.org, 512-609-1876).

Discretionary Funds

Discretionary funds rest on the canonical authority embodied in TEC Canon III.9.6(b)(6). All clergy are expected to know and follow the Diocese of Texas policy on the use of discretionary funds. Members of the clergy who use discretionary funds for personal use may be subject to income tax reporting requirements, as well as ecclesiastical, civil, and/or criminal penalties. (*See Discretionary Funds.)*

Identification of Candidates for Ordination

All clergy are to nurture possible vocations to ordained ministry, being attentive to persons in the local setting who may have such gifts. The Commission on Ministry Office can provide additional guidance. The Rt. Rev. Kathryn M. Ryan is the Executive for Ministry and oversees the discernment process for Holy Orders.

Clergy also have the responsibility for redirecting nominees whose gifts may not support an ordained vocation, rather than nominating candidates who are unlikely to be accepted at the diocesan level. Please direct all questions about the local discernment processes to Ana Gonzales May in the Commission on Ministry office in Austin at agmay@epicenter.org.

The Diocese of Texas offers three types of application processes: deacon, priest, and bi-vocational priest. Deacons and bi-vocational priests normally receive only a nominal stipend from a church or institution of the Diocese. Application materials are available from the Commission on Ministry office in Austin.

Mentoring of New Clergy

As part of the Curate Program of the Diocese, newly ordained curates will be mentored by an assigned supervising rector and will participate in Curate Camp. All supervisors are required to attend Supervising Rectors Orientation.

Pastoral Relationships after Transition

Questions about clergy transition, including the expression of interest in transitioning within the Diocese of Texas, are properly directed to the Canon for Transitions. *(See Clergy Transition.)*

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

The Bishop expects that the clergyperson will accept no further requests from members and former members of the congregation to provide pastoral services at weddings, funerals, baptisms, or any other occasion of public worship until at least one year after the new rector arrives.

After one year, clergy may accept invitations from the rector but may not solicit such invitations.

Clergy Wellness

Clergy are expected to attend to their physical health, emotional, and spiritual wellness, and to their personal relationships. This is vital for the mission of the Diocese of Texas. Resources for clergy and family wellness can be found at www.epicenter.org/wellness-and-care/, including pastoral resources and information and links for the Employee Assistance Program (EAP), offered through Cigna Behavioral Health. (This is a free, confidential 24-hours-a-day service that assists members and their covered dependents with information, educational materials, resources, referrals, and ongoing support. The plan covers unlimited telephone consultations and up to 10 face-to-face counseling sessions per issue at no member cost.)

Clergy Addiction and Recovery

Clergy with Substance Use Disorder are responsible for their own recovery. The Diocese of Texas will provide resources for assessment, recovery, and support, www.epicenter.org/for-leaders/ministry-integrity-and-wellness/wellness-and-care/clergy-recovery. Substance Use Disorder is a progressive condition; it will not get better or go away without treatment. Therefore, clergy who think they may have an addiction issue are *strongly urged* to seek diocesan guidance and support through the Bishop for Pastoral Care (jfisher@epicenter.org) or the Canon for Wellness and Pastoral Care (sgaventa@epicenter.org).

Reports of clergy intoxication at parish/school activities are taken very seriously and will be addressed pastorally through exploratory questioning about chemical abuse or dependency and consideration of a formal chemical dependency assessment from a credentialed chemical dependency treatment specialist. Should SUD be diagnosed, rigorous pursuit of recovery is expected by--and will be supported by—the diocese. Unaddressed, untreated SUD imperils parish communities, as well as clergy families and is unacceptable.

A clergyperson dealing with SUD, who might wish to be considered for transition or employment, will be assessed after a recovery period in the range of two to five years, depending on the following: motivation to obtain assessment and treatment, response to treatment of not less than two years, achievement of sobriety or cessation of the addictive behavior, and a record of relapse prevention.

Finances

Clergy are expected to conduct personal finances with integrity, living within their means and modeling good stewardship. Should a clergy person find themselves in financial difficulty, they are encouraged to seek appropriate help from financial experts outside of the parish. As noted in Safeguarding God's People: Policies Prohibiting Sexual Exploitation, clergy are prohibited from receiving or requesting personal loans, substantial gifts and/or money from parishioners. The finance teams of the Church Pension Group and EDOT both can offer guidance for negotiating financial challenges. The Canon for Wellness and Care may be contacted for resource referrals.

Sabbatical

All clergy will accrue two weeks of cumulative sabbatical time each year. A sabbatical cannot be taken until after the completion of six years of ordained ministry in the Diocese of Texas, unless otherwise negotiated in one's initial letter of agreement. The sabbatical will be with full pay and allowances, and may be taken in conjunction with annual vacation and continuing education time, but may not exceed four (4) months in length. For more information, visit the Wellness and Care webpage at www.epicenter.org/for-leaders/ministry-integrity-and-wellness/wellness-and-care/sabbatical-information/. Clergy are expected to return and serve at least one year following their sabbatical. Sabbaticals are not an earned benefit to be paid out upon resignation.

In order for grant funds to be considered nontaxable to the clergyperson, funds received by the congregation must be accounted for with receipts for sabbatical expenses. If funds, either prepaid or reimbursed to the clergyperson, are not accounted for with receipts, then those funds will be reported as taxable income to the clergyperson.

Moral Discipline

It is expected that all clergy will live moral and chaste lives, taking seriously their roles and ministries in the Christian community. All clergy must abstain from sexual relations outside of marriage, and abide by other standards of conduct outlined in C&C IV.4.

Diocesan Participation

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

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

Immigration Matters

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

Relationships between Clergy of Different Congregations

Clergy who are settled in a particular cure are expected to exercise pastoral oversight and care of persons in their given cure. To intrude, uninvited, into the cure of another clergyperson is a significant breach of professional ethics.

This proscription applies to retired and non-parochial clergy as well as to clergy with cure. If such a pastoral relationship is established, the clergyperson with oversight must be informed. *(See Clergy Transition.)*

Constitution & Canons

All clergy are expected to be familiar with the content of the Constitution & Canons of The Episcopal Church (https://www.generalconvention.org/publications#CandC), the Constitution & Canons of the Protestant Episcopal Church in the Diocese of Texas (www.epicenter.org/about/governance/constitution-and-canons/), and the bylaws (if any) of the local congregation.

Pastoral Counseling

Pastoral counseling, which is associated with ordained ministry, especially parish ministry, is quite different from the therapeutic disciplines. Pastoral counseling usually involves a conversation regarding a spiritual concern, a religious question, or a life-changing occurrence such as a death in the family or an upcoming marriage, and is brief in nature - usually three or four sessions, maximum.

Clergy must refer clients to a professional therapist/counselor when it becomes evident that the presenting concern is beyond the scope of pastoral counseling or when the maximum number of sessions is reached. Most clergy are not psychotherapists, marriage family and child counselors, clinical social workers, or licensed counselors. Those who are not must establish boundaries to facilitate the appropriate care for individuals requesting counseling.

Some activities that take place on church premises, parish-sponsored activities such as lay spiritual direction, Stephen ministries, and renewal gatherings such as Cursillo and Faith Alive, may be interpreted by participants as counseling activities although they do not fit the definition of either type of counseling. Prospective participants in these activities should sign a release of liability and hold-harmless agreement stating that they understand the nature of the activity and accept personal responsibility for their participation *(as recommended by Church Insurance Agency Corporation)*.

Social Media

A priest, deacon, or bishop is always a priest, deacon, or bishop. All postings, whether on the clergy's personal social media accounts or the church's social media account, should reflect appropriate boundaries and respect for all people. (*See Virtual Ministry, Social Media, and Digital Communications.)*

Expectations of Heads of Congregation

Terminology: "Head of Congregation"

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

Values, Mission, and Goals

The head of congregation is required to attend to the health of the congregation, in addition to personal wellness. It is the responsibility of the head of congregation to assure that the congregation articulates its values and mission and sets appropriate goals. This focus can provide a basis for mutual ministry review. Many congregations begin with the Holy Cow! Congregational Assessment Tool. The Mission Amplification team can connect you with resources for this work.

Instruction in the Faith

The head of congregation is required to provide for appropriate instruction in the Christian faith for persons inquiring and for the spiritual development of congregational members.

Instruction for inquirers should include information on the history and polity of the Episcopal Church. Membership in the Episcopal Church includes the presentation of such persons to the Bishop for confirmation or reception.

Licensing Lay Ministers

Lay licenses are issued for the institution requesting the license only and are not transferable to any other institution within or outside the Episcopal Diocese of Texas. Contact Nina Gaspar, ngaspar@epicenter.org, for a list of lay persons currently licensed in the congregation.

The head of congregation is responsible for requesting all lay licenses. "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." (C&C III.4)

Lay licenses for worship leader, eucharistic minister, eucharistic visitor, catechist, and evangelist are requested by submitting *a Lay License Request Form* to Max Lange, mlange@epicenter.org. The application can be downloaded from www.epicenter.org/for-leaders/lay-resources/. (Scroll to the bottom of the page.)

Licensing Lay Preachers

Licenses for lay preachers must be requested by email to the Canon to the Ordinary: cfaulstich@epicenter.org, or mailed to 1225 Texas Ave., Houston, TX 77002. Your email should include the layperson's name and contact information, a description of the context of anticipated preaching, a character reference, and a list of his or her qualifications to preach, if any.

All lay preachers, due to their pastoral role in the congregation, are expected by the Diocese to obtain and maintain certification in Safeguarding God's People.

All licensed lay preachers are required to have completed the Iona School for Ministry's Lay Preacher Track, which is a 1-year (2-semester) preaching course, which satisfies the Bishop's expectation for an adequate level of theological education for licensed lay preachers.

Lay preacher licenses are issued for the institution requesting the license only and are not transferable to any other institution within or outside the Episcopal Diocese of Texas. They are only valid while the clergy who requested the license is serving at the institution where the license is held.

Parish Administration

There are a variety of administrative matters that fall to the head of congregation, including oversight of the maintenance of church records, personnel matters, abuse prevention programs, requests to the Bishop for lay licensing for various ministries, and completion of the annual parochial report and its attendant schedules.

The head of congregation is charged with the supervision of all staff, whether clergy or lay, paid or volunteer.

Each lay employee is to have a personnel file that contains an application, appropriate background and reference checks, IRS Form W-4, and IRS Form I-9, if necessary, as required by the Immigration Reform and Control Act.

The head of congregation is to provide for the regular review and evaluation of all staff and to document the process in the personnel files. These are confidential personnel records and are to be kept in locked cabinets in the church office. *(See Parish Administration.)*

Personnel files for clergy are maintained by the Bishop's Office, who is also responsible for clergy background checks. All letters of call, agreement, or placement must be filed with the Bishop's Office through the Canon to the Ordinary.

If a head of congregation receives any report of sexual misconduct or abuse, he or she is to immediately inform the Office of the Bishop and the Safeguarding Minister and receive instructions before taking any action, other than reporting to the authorities the sexual abuse of a child or of an adult with disability or a person over age 65. If child sexual abuse is alleged to have been committed by a volunteer or employee of the congregation, then that person is to be removed from contact with the child pending investigation.

Diocesan Policies for Safeguarding Children,Youth, and Adults are available online at www.epicenter.org/for-leaders/ministry-integrity-and-wellness/safeguarding/.

Safeguarding Minister, The Rev. Canon Sarah Gaventa, The Diocesan Center in Austin: 512-478-0580 or 800-947-0580, sgaventa@epicenter.org

While the vestry or Bishop's committee is canonically responsible for financial matters, the head of the congregation has a fiduciary responsibility to ensure that appropriate insurance coverage, financial reporting capabilities, and financial internal controls are in place, as well as to ensure compliance with EDOT Canon I.4.5 regarding audits.

It is the responsibility of the head of congregation to consult with the Director of Foundations in the Financial Services Department before a congregation undertakes facilities renovation or expansion. The Church Corporation holds title to congregational property and by canon must approve all such proposals.

The Financial Services Department is available to assist or answer questions. Consult the diocesan website for information about compensation and reimbursement guidelines, rules and regulations of church governance regarding financial matters, audit guidelines, property insurance, and many other important resources: www.epicenter.org/diocese/the-office-of-financial-services/.

The head of congregation is required to discharge the above named administrative responsibilities, and failure to do so may result in ecclesiastical discipline. The head of congregation is to be conversant with the policies related to these areas and to see that they are properly administered. The diocesan staff is available for consultation and assistance.

The head of congregation is required to ensure that the church's information on www.episcopalchurch.org/diocese/texas is up-to-date. If your church's information is inaccurate, you must click *"Is this page accurate? Submit a change."* at the bottom of your church's page and submit update information.

Expectations of Assistants, Associates, Curates, and Non-Staff Assisting Clergy

Clergy who assist in congregations, including assistants, associates, curates, and non-staff assisting clergy, owe a duty of loyalty to the head of congregation, at whose pleasure they serve. In the course of ministry, they are to support the ministry, programs and administration of the rector/vicar. All assisting clergy must have a Letter of Call or Appointment and a Letter of Agreement. *(See Clergy Transition.)* Templates for Letters of Agreement and Call are available from the Canon to the Ordinary's office.

Assisting clergy are to comply with the policy on rector transitions. *(See Clergy Transition.)*

In the event of serious disagreement between an assisting clergy and rector/vicar or other disputes between clergy, note the following expectations:

1. All clergy serving in the Diocese of Texas may contact the Bishop to discuss any concern related to their ministry.
2. Most problems can and should be solved in discussion with the clergy person's immediate supervisor, and clergy are encouraged to utilize this as a first step. However, clergy may also discuss issues or concerns with the rector, if that is the next level of management.
3. If the clergy person desires to contact the Diocese, the clergy person may bring his or her concern to the attention of the Canon to the Ordinary, the Regional Bishop, or the Diocesan Bishop. The Canon to the Ordinary or Regional Bishop may advise the Diocesan Bishop that a matter related to clergy has been brought to them for resolution. The Diocesan Bishop, in his discretion, may intervene to provide direction or guidance to those involved in the matter.
4. Although these steps are designed to resolve clergy concerns quickly and directly, clergy persons have the right to contact the Diocesan Bishop or his designee directly if they believe following these steps would be futile, or if previous attempts to solve the problem at a lower level have been unsuccessful.
5. This policy for resolution of clergy issues includes the assurance that any clergy person who pursues his or her right to communicate with any level of church management will not experience any retaliation or interference from the clergy person's immediate supervisor. Any complaint of retaliation should be reported to the Canon to the Ordinary or the Diocesan Bishop.
6. In keeping with the goal of resolving conflicts at the earliest possible opportunity, clergy should address issues involving other clergy who are co-workers directly, either one on one, or with their supervisor's assistance. Disputes between clergy should not be communicated to or include other clergy, staff, the vestry, members of the congregation, or any person outside the congregation. If the two clergy persons involved cannot reach a resolution, or if the matter involves additional clergy, it should be reported directly to the Bishop to avoid a disruption to the church.
7. The termination of the assignment of any clergy person must be approved by the Diocesan Bishop.

Expectations of Bi-Vocational Priests

Bi-vocational priests are invited to attend Clericus meetings and the annual Clergy Conference as permitted by their schedules. They are expected to attend Diocesan Council. They must earn 12 Continuing Education Units per year.

The formation and ordination track for bi-vocational priests was created in the Diocese of Texas to be used at the option of the Bishop for the missionary need of small congregations without the resources to employ a salaried priest. This ministry of bi-vocational priesthood has been particularly crafted for the health of mission in small congregations. The track includes formation at Iona School for Ministry and does not require or envision the earning of an M.Div. degree from an accredited seminary, otherwise required for ordination in the Diocese of Texas. As agreed upon prior to ordination, the Diocese of Texas will continue the expectation that bi-vocational priests and deacons serve with nominal compensation in the congregations of the Diocese.

Bi-vocational priests and deacons serve during active ministry and post-retirement by appointment of the Bishop Diocesan. The Diocese expects bi-vocational priests to work up to 12 hours a week, except those priests and deacons who are receiving health insurance. All clergy on the health insurance plan must serve 1,000 hours a year. Each year, all bi-vocational clergy are to receive 2 weeks, including Sundays, off for continuing education and 4 weeks, including Sundays, off for vacation. It is the Bishop Diocesan's expectation that this time away is taken and these hours are kept. It is the congregation's responsibility, in living out the members' baptismal identity, to help cover ministry duties requiring time in excess of hours given by the ordained leaders. Furthermore, we believe that time off should be used for rest and not for supply work in other congregations. Upon retirement, bi-vocational clergy may receive remuneration for supply work. Our expectation is that bi-vocational priests and deacons will serve in their ministry a minimum of 6 years post-ordination before exploring a transition to salaried congregational ministry. Upon the invitation of the Bishop Diocesan, and after six-years of ordained ministry, individuals may be invited to do further study in order to transition to full-time or compensated work. The additional study will require a minimum of one year in an accredited and approved seminary, in addition to Clinical Pastoral Education and, in some cases, field work. At any time after their ordination, upon initiation by the Bishop Diocesan, bi-vocational priests and deacons with specialized skills may be approved for compensation in cases of compelling missionary need.

Business Expenses
Office and business expenses, including auto/travel allowances, are not typically part of a clergyperson's compensation package, but are budgeted in the congregational budget. Bi-vocational priests should be reimbursed for reasonable business expenses as outlined in their letters of call and agreement.

Expectations of Vocational Deacons

Deacons are invited to attend Clericus meetings, as permitted by their schedules. They are required to attend Diocesan Council. They must earn 12 Continuing Education Units per year. Once a year, deacons are required to submit a report of their activities by November 15th. These reports may be submitted to the Executive Assistant to the Canon to the Ordinary, Kathryn L. Herman (kherman@epicenter.org).

In the Diocese of Texas, the ministry of the vocational deacon is as follows:

1. The deacon has a special servant ministry under the supervision of the Bishop Diocesan or the Bishop's designee. The Bishop will make all assignments for deacons.

2. The deacon may be assigned to serve within a parish setting, within a diocesan institution, or within a secular setting.

3. The deacon is the bridge that links the Church and the world through both word and deed in servant ministry.

4. The deacon models servant ministry in the world. Deacons will continue their work at secular jobs or in the home.

5. The deacon will normally receive only a nominal stipend.

6. The deacon serves as an icon of servanthood within the liturgy. In doing so, the deacon does not replace the ministry of laypersons. The deacon reads the Gospel and may lead the Prayers of the People. The deacon serves at the Lord's Table, preparing and placing on it the offerings of bread and wine, and assists in the ministration of the Sacrament to the people. The deacon dismisses the people at the end of the Eucharist to be Christ's ministers of reconciliation within the world. From time to time, it is also appropriate for the deacon to preach in order to proclaim the Gospel, to make the needs of the world known to the Church, and to exhort God's people to do Christ's servant ministry in their day-to-day lives.

7. As servant leaders, deacons will usually wear regular secular dress. To wear clericals is only appropriate when serving liturgically or when wearing clerical dress to facilitate ministry in the world (such as during hospital or prison visits).

8. If a vocational deacon feels called to the priesthood, he or she must begin a new ordination process.

9. The Order of the Deacon must not be confused with the Order of Priest. It is not consistent with the deacon's call to be head of congregation. There will be no "deacon's masses."

10. As stated in the Canons of the Diocese, a vocational deacon will have voice and vote within the Councils of the Diocese.

11. The Deacon will follow the Rubrics for a Deacon Performing a Marriage in the Diocese of Texas.

Business Expenses
Office and business expenses, including auto/travel allowances, are not typically part of a clergyperson's compensation package, but are budgeted in the congregational budget. Deacons should be reimbursed for reasonable business expenses as outlined in their letters of call and agreement.

Expectations of Non-Parochial Clergy

Clergy who are not employed by a congregation of the Diocese are considered non-parochial clergy. They are encouraged to participate in all activities of the Diocese and must make the annual report required by TEC Canon I.6.2. *Expectations of All Clergy* also apply to non-parochial clergy.

Expectations of Retired Clergy

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

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

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

Retired Clergy must follow the Retired Clergy Active in Ministry guidelines on income in order to be in compliance with the Church Pension Group.

Expectations of Licensed Clergy

Licensed clergy are welcome in the Diocese and are encouraged to participate fully in its life. Please request the application for license from the Recorder of Ordinations, Millie Longoria, at the Houston Diocesan Center, 713-520-6444, mlongoria@epicenter.org. Licensed clergy are subject to the same expectations outlined in the *Expectations of Clergy*, including *Background Checks* and *Sexual Abuse Prevention*. If they wish to serve as supply clergy, they must be conversant and in compliance with the policies outlined in *Clergy Transition*. To be added to the supply clergy list, please contact Kathryn L. Herman at the Houston Diocesan Center, 713-520-6444, kherman@epicenter.org.

A conditional license may be granted upon request following the completion of all required background checks or at the request of the Bishop Diocesan or Canon to the Ordinary.

In addition, licensed clergy are required to make an annual report to the Bishop and to request licensing prior to the expiration date of their current license, if that is their desire. If no report or request for license is received, they will be removed from the list of licensed clergy and must reapply to be reinstated.

Licensed clergy are reminded that they are to comply with TEC Canon I.6.2, making an annual report to the Bishop of the Diocese in which they are canonically resident.

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

Licensed clergy not serving as heads of congregations or as assisting clergy may register for Diocesan Council as visitors and are encouraged to do so.

ELCA clergy may be considered for license, if requested by a head of congregation. Such clergy must present, in addition to the standard licensing requirements, a letter from their bishop approving the license application. If they are not residing in their home synod, they must also have approval from the Lutheran bishop in whose synod they reside. Please request the application for ELCA clergy license from Millie Longoria at the Houston Diocesan Center, 713-520-6444, mlongoria@epicenter.org.

Expectations of Clergy Not Ordained in the Episcopal Church

Policy Regarding Participation in Congregational or Pastoral Settings

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

Staff Members

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

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

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

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

Volunteers

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

Weddings and Funerals

At their discretion, clergy may invite other qualified clergy to participate in certain pastoral services described herein. Clergy are never required to issue such an invitation. The officiant must always be an Episcopal clergyperson. With the specific permission of the Bishop, clergy of the Evangelical Lutheran Church in America may officiate, using *The Book of Common Prayer*. Qualified non-Episcopal clergy participating in a single pastoral service may wear the vestments that are customary in their tradition.

For all other clergy, participation is limited to the following roles:

Weddings

- Declaration of Consent
- Readings from Holy Scripture
- Prayers of the People
- Dismissal
- When Holy Eucharist is celebrated, an Episcopal clergyperson is to read the Gospel and serve as the celebrant. The clergy guest may stand beside the celebrant during the Prayer of Consecration and assist in the distribution of the elements, using the language specified in *The Book of Common Prayer.*

Funerals

- Opening Anthem
- Readings from Holy Scripture
- Prayers of the People
- When Holy Eucharist is celebrated, an Episcopal clergyperson is to read the Gospel and serve as the celebrant. The clergy guest may stand beside the celebrant during the Prayer of Consecration and assist in the distribution of the elements, using the language specified in *The Book of Common Prayer*.
- At the Commendation, the Anthem(s)
- At the Committal, the Anthem

Note: When a priest or deacon dies, the Bishop customarily officiates at the funeral, if available. The Bishops' Funeral Customary should be obtained from the Office of the Bishop, smarlatt@epicenter.org, as soon as possible when a death is anticipated or has occurred.

Occasional Joint Services with Evangelical Lutheran Church in America (ELCA)

Permission is given for ELCA clergy to participate in joint services. Diocese of Texas clergy and congregations may also participate in these services with other ELCA congregations. If such a service is planned more than twice a year, the Bishop's specific permission must be obtained. When the service is held in an Episcopal church, *The Book of Common Prayer* is used. When worshiping in a Lutheran church, the *Book of Worship* may be used. More information about the common mission agreement with ELCA can be found here: www.episcopalchurch.org/ministries/ecumenical-interreligious/agreement-of-full-communion-called-to-common-mission/.

Interim Eucharistic Sharing with the United Methodist Church (2006)

Common, joint celebration of the Eucharist is permitted where it is deemed appropriate for the sharing of worship by congregations of the respective Churches. An ordained United Methodist elder or bishop and an ordained Episcopal priest or bishop stand together at the Lord's Table. The service of worship must be authorized and agreed upon by the United Methodist and Episcopal bishops involved. As a general rule, the normative patterns of Eucharistic worship in the host location should govern the joint worship service.

Please note that this provision is less permissive than provisions for sharing ministry with ELCA. For detailed guidelines, go to www.episcopalchurch.org/ministries/ecumenical-interreligious/united-methodist-episcopal-dialogue/.

Ecumenical Agreement with the Presbyterian Church, USA (2009)

In the Presbyterian Church, an Episcopal priest may celebrate communion and preside at the Sacraments, under certain conditions. In the Episcopal Church, a Presbyterian Minister of Word and Sacrament may preach, lead Morning Prayer or Evening Prayer, officiate at the Ministry of the Word, or preside at a communion service using an authorized rite of the Presbyterian Church (always with the permission of both the presbytery of the PCUSA and the diocesan bishop as liturgical authority). For more information about the agreement, go to www.episcopalarchives.org/GC2009/18_ecu/2009-A072.pdf.

"Episcopal," "Anglican," or "Continuing" Splinter Groups not part of ECUSA:

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

3 - Safeguarding Ministry in the Diocese of Texas

The Diocese of Texas expects all congregations, schools, and other Diocesan organizations to be environments of health, safety, and mutual care, where sexual misconduct, harassment, bullying, and other harmful conduct is not tolerated. The Safeguarding Ministry, a ministry of Wellness and Care, helps communities to fulfill this expectation. Safeguarding is our Diocesan expression of the Safe Church, Safe Communities program of The Episcopal Church.

The Safeguarding policies of the Diocese establish behavioral expectations for ordained and lay ministers, set out screening and training requirements, and outline protocols for reporting violations. The policies consist of *Safeguarding God's Children: Policies for the Protection of Children and Youth, Safeguarding God's People: Policies for Safe Ministry with Adults,* and *Safeguarding God's People in the Workplace*: *Policies Preventing Sexual Harassment*. The current versions of these policies may all be found at www.epicenter.org/for-leaders/ministry-integrity-and-wellness/safeguarding/policies-and-help-sheets/ and are incorporated by reference into this Clergy Manual.

These policies are available in both English and Spanish, and each is accompanied by specific and required administrative and record-keeping procedures. Additional Safeguarding resources are available online.

Please direct questions about policy interpretation, policy application, and misconduct reports to the Canon for Wellness and Care/Safeguarding minister, the Rev. Canon Sarah Gaventa, sgaventa@epicenter.org. Misconduct reports may also be made to reports@epicenter.org.

Communications regarding the screening, training, and record-keeping for the laity should go to the Safeguarding Manager, Marty Brickley, mbrickley@epicenter.org.

Communications regarding the screening, training, and record-keeping for clergy should go to Danielle Tatro, Assistant to Wellness and Care, at dtatro@epicenter.org.

The Safeguarding/Wellness and Care office is located at the Diocesan Center in Austin on the Seminary of the Southwest campus, 512-478-0580 or 800-947-0580. See the Staff webpage of the Diocesan website for individual contact information for members of the Wellness and Care Team.

Policy Statement
Prohibiting Adulterous Relationships

The diocesan policies prohibiting sexual abuse, sexual exploitation, and sexual harassment are found in *Safeguarding God's Children: Policies for the Protection of Children and Youth*, *Safeguarding God's People: Policies for Safe Ministry with Adults*, and *Safeguarding God's People in the Workplace: Preventing Sexual Harassment*. The policies make clear that sexual abuse, sexual exploitation, and sexual harassment on the part of any clergyperson or any employee or volunteer of any congregation, school or other organization within the Diocese violates the mission of the church, is prohibited, and will not be tolerated. These policies may be found at www.epicenter.org/for-leaders/ministry-integrity-and-wellness/safeguarding/.

The above policies, however, do not specifically address consensual adulterous relationships between adults.

Relationships involving sexual gratification outside of one's own marriage covenant are violations of one's vows made before God. For members of the clergy, such relationships are subject to Title IV proceedings as Conduct Unbecoming a Member of the Clergy. For lay employees and volunteers in the organizations of the diocese, such relationships reflect negatively upon the Church and may be cause for removal from one's position or ministry.

Directives for Clergy

1. Clergy are not to claim directly or by implication any pastoral or professional qualifications that exceed their actual qualifications or abilities. Clergy are expected to make appropriate referrals for matters that go beyond moral, spiritual, or religious guidance or whenever the needs of parishioners exceed those that can be competently handled by the clergyperson.

2. Generally, counseling is to be done in church offices during work hours. If individual counseling is done after hours, a staff member or volunteer must be present in the building.

3. Clergy should treat all pastoral conversations as confidential; however, if a person communicates an intention to harm himself, herself, or others, such communication must be reported appropriately.

4. Reconciliation of a penitent is a sacrament of the Church. When hearing a sacramental confession (the rite of Reconciliation of a Penitent), it must be remembered that "the secrecy of a confession is morally absolute for the confessor and must under no circumstances be broken." However, if the penitent confesses to child sexual abuse, the confessor can and should withhold absolution until the penitent notifies the authorities.

5. Clergy should not work in isolation but must be mindful of the need to maintain collegial and professional associations. It is necessary for clergy to develop and maintain such associations for the purposes of maintaining supervisory skills, theological and spiritual insights, educational acumen, and current knowledge of resources for ministry. Forming a clergy support group is encouraged.

6. Clergy are to seek appropriate professional assistance for their own personal problems and conflicts, especially those that might impair their pastoral ability and judgment.

Weapons Policy

The Episcopal Diocese of Texas does not permit any person, including clergy, staff, students, volunteers, and visitors, to carry a weapon in our churches or schools. This prohibition applies even if the person is licensed to carry a weapon under Texas law. Law enforcement officers are the only exception to this policy.

The following are guidelines for keeping our churches and schools safe.

1. Churches and schools may hire off-duty police officers. These officers are trained in how to respond to threats to safety, including from armed intruders, and understand the degree of force necessary in various situations. When an officer responds, at whatever level, he or she is serving in the capacity of a law enforcement professional, with the legal safeguards that apply.

2. Churches and schools may consult with local police departments to learn what measures should be taken to prepare students and staff for emergency situations, including when an intruder enters the building or threatens harm. The police can assist in the development of a contingency plan including periodic safety drills. Schools should follow SAES, IAS, and/or NAES guidelines, depending on their association.

3. Churches and schools may hire private security firms. Some security firms hire retired police officers who have been trained in how to respond to threats of safety.

In all instances, churches and schools should be mindful of safety measures that can minimize the risk of harm to persons entrusted to their care, and should undertake a careful review of applicable policies, including those pertaining to access to buildings. All personnel must be vigilant in order to be able to identify and report any suspicious or threatening behavior. This awareness may prove crucial in our ability to diffuse a dangerous situation and prevent harm.

Please go to www.epicenter.org/for-leaders/clergy-resources/gun-law-and-policy/ for guidance on implementing this policy.

Virtual Ministry, Social Media, and Digital Communications

All digital communications must comply with Safeguarding policies. Ministry use of virtual platforms (such as Zoom) and social media is evolving, and protocols should be revisited as technology and platforms change. When questions arise about applying Safeguarding policies to a particular technology or platform, consult with the Safeguarding Minister.

1. **Implement consistent privacy settings** that respect personal boundaries with all participants across all platforms.
   a. Remember that privacy settings do not ensure confidentiality.
   b. Each organization should develop and publish agreed upon privacy settings that staff and volunteers will use and make that information available to members of the community.
   c. For virtual meetings or classroom forums, utilize passwords and/or waiting rooms that require the facilitator to admit each participant.

2. **Be accountable.**
   a. Ministry presence on social media platforms should have more than one adult administrator.
   b. The Head of Organization and Supervisor should know how social media and virtual platforms are used in ministry. If the ministry involves children or youth, parents must also be informed of the way that social media and virtual platforms are used in the ministry.
   c. All virtual meetings or classes involving children, youth, or Vulnerable Adults should be scheduled in advance on a calendar that is shared, together with log-in information and passwords, with the Supervisor and, when applicable, with parents or caregivers.
   d. Consider recording all events that are held on virtual platforms. Before recording children or minors, obtain parental approval (*See Policies for the Protection of Children and Youth, Section IV.A.2*)
   e. Any digital communications or posted material on online groups that raise pastoral concerns or are of a potentially harmful nature (such as bullying, abuse, etc.) must be removed but should be saved and disclosed to the Supervisor and Head of Organization and, as appropriate, with parents or caregivers.
   f. Obtain parental approval before posting images or recordings of children or youth on social media or websites. *(See Policies for the Protection of Children and Youth, Section IV.A.2)*
   g. Any inappropriate material posted in online groups must be removed but should be saved by the administrator and reported to the Supervisor to be addressed.
   h. Frequently review the content and photos posted on social media platforms and websites.

3. **Social media is rarely appropriate for a sensitive matter** that requires pastoral care and attention. In those instances, a face-to-face meeting or phone call is preferable as it allows for an assessment of tone and demeanor to help evaluate the situation and determine both urgency and appropriateness of a response.

4. In group communication and on virtual meeting platforms, **create covenants** that address:
   - Appropriate and inappropriate language and behavior (sexual, profane, or derogatory language, and any sort of bullying are forbidden)

- Who may join and/or view a group activity
- Content that may be posted/published on the site or page
- How images will be taken and shared
- Consequences for breaking the covenant, which may include removal from group
- Mandatory rules for reporting misconduct

i. Consider **disabling private chat features** on virtual platforms when private conversations are not necessary to the purpose of the gathering.

ii. **When video chatting or meeting on virtual platforms involving video:**
   - Be mindful of appropriate attire and surroundings that are visible to the viewer.
   - One-on-one video chatting or meetings should follow the same Safeguarding guidelines as when meeting in person.

iii. **Use prudent judgment in the timing of digital communications** to maintain appropriate boundaries and avoid the appearance of impropriety.

iv. Laws regarding **mandated reporting of suspected abuse, exploitation, or neglect** of children, youth, elders, and vulnerable adults apply in the virtual world just as they do in the physical world. Report suspected abuse to the Texas Department of Family and Protective Services: 800-252-5400. The rules of reporting found in Section VIII of these policies also apply.

4 - Clergy Transition & Benefits

Please direct all questions regarding clergy transition to the Canon for Transitions, the Rev. Canon Kellaura Johnson, kjohnson@epicenter.org.

In the Episcopal Church, clergy may be placed only with the approval of the Bishop Diocesan.

Heads of Congregation are responsible for notifying the Bishop's Office, through the Canon to the Ordinary, of all clergy transitions at their congregation. This includes clergy new hires, updates to letters of agreement, title changes, and the end of ministry at the congregation.

The Search Process

Participation in Searches

The Bishop expects clergy to notify the Canon for Transitions when they are involved in a search process outside the Diocese of Texas.

Search Assistance

The Canon to the Ordinary is available to assist clergy in transition within and without the Diocese of Texas. The Office for Transition Ministry in the national church office is another resource, www.episcopalchurch.org/page/transition-ministry.

Eligibility

The Bishop Diocesan determines eligibility for transition ministry in the Diocese of Texas. It is based upon the clergy's qualifications. It is also dependent upon meeting the *Expectations of Clergy*. No clergy is eligible to be called as rector or vicar in the church he or she currently serves or has previously served.

All clergy in good standing, bi-vocational priests and deacons included, may seek positions outside the Diocese. Clergy are encouraged to communicate their intentions to seek positions outside the Diocese to the Canon for Transitions.

Staff Clergy Searches

Rectors who would like to call clergy or lay staff to join their congregational staffs from other congregations in the Diocese must consult the Bishop Diocesan, through the CANON FOR TRANSITIONS, before they initiate conversations with clergy, and are expected, out of courtesy, to inform the potential candidate's rector of the intention to pursue the rector's staff member.

The Bishop Diocesan must be consulted, through the CANON FOR TRANSITIONS, before any member of the clergy can be asked to join a staff. All letters of agreement for clergy must be approved by the Bishop's office through the Canon to the Ordinary.

The Bishop Diocesan must be consulted before a Rector of congregation contemplates calling assistants from outside the Diocese. The Bishop will not accept Letters Dimissory if not consulted in advance.

Deacons/Curates

The Bishop of Texas makes all ministry assignments for deacons and curates.

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

The Bishop must give approval for a rector to consider recruiting or hiring a curate or deacon from outside the Diocese of Texas. A curate or deacon is required to release a full canonical file. For assistance, contact the Canon for Transitions.

Expectations during Transition

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

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

One year after the new rector arrives, clergy may accept invitations from the rector but may not solicit such invitations.

The Calling Process

Terms

a. *Rector* is a term for the duly appointed priest in charge of a congregation with all the rights and responsibilities as outlined in TEC Canon III.9.6 and following. The rector shall have been appointed after the vestry and the Bishop have certified that he or she is duly qualified, duly elected, and has accepted election.
b. *Acting Rector [Priest-in-Charge, TEC Canon III.9.3(b)]* is a priest who is recommended to the vestry by the Bishop Diocesan and who is officially accepted by the vestry to serve as acting rector for a year. At the end of six months, or sooner with the Bishop's permission, and prior to the conclusion of one year from the start date, the vestry may call the acting rector to serve as rector.
c. *Interim Rector* is a priest from outside the congregation who is selected by the vestry in cooperation with the Bishop as the priest in charge whose Letter of Agreement designates the priest as rector for a period of time during a transition between rectors. An interim agreement may last for months or years depending upon the situation.
d. *Vicar* is a term for a duly appointed priest in charge of a mission congregation with all the rights and responsibilities as outlined in TEC Canon III.9.6 and following. The Bishop appoints a vicar.
e. *Priest-in-Charge* is the canonical term for a clergyperson in charge of a congregation who is not a rector or vicar. Priest-in-charge refers to any priest exercising the rights and responsibilities of the rector/vicar during an interim.
f. *Pastoral Leader* refers to a layperson in the bi-vocational priest track who is called by the Bishop and appointed head of congregation.

Documents of Call

Several documents are part of the canonical appointment of all clergy:

1. Letter of Call/Appointment
    a. Letter of Call to a rector/vicar from the vestry / Bishop's committee
    b. Letter of Call to other clergy staff from the rector/vicar
    c. Letter of Appointment from the Bishop will be issued in certain cases
2. Letter of Agreement
    a. between vestry / Bishop's committee and rector/vicar
    b. between rector and other clergy staff
3. Letter of Institution from the Bishop Diocesan for rector/vicar only

Please contact the Canon for Transitions to request clergy Letters of Call and Letters of Agreement forms, Kjohnson@epicenter.org.

Celebrations of New Ministry

A bishop of the Diocese of Texas will officiate at Celebrations of New Ministry for rectors and vicars. If a bishop is not available, the dean of the respective convocation will officiate at Celebrations of New Ministry for bi-vocational vicars/rectors. Contact the assistant to your regional bishop to request a date for a Celebration of New Ministry.

Canonical Residence

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

Letters Dimissory

Rector, Vicar, Missioner, Church Planter, or Canon: Clergy appointed as rector, vicar, missioner (fulltime positions only), church planter, or canon (diocesan staff) are required to present Letters Dimissory within three months of their appointment.

When a call to the Diocese of Texas has been issued and accepted, clergy should request that their Letters Dimissory from the Ecclesiastical Authority in the diocese of their canonical residence be sent to The Rt. Rev. C. Andrew Doyle, in care of Registrar Millie Longoria at mlongoria@epicenter.org.

Priest-in-Charge: Clergy who are serving as Priest-in-Charge but are not doing so in an interim capacity should present Letters Dimissory within three months of their appointment.

Assistant, Associate: Clergy who are employed full-time in a congregation or diocesan institution and have been serving in ministry for 2+ years may present their Letters Dimissory to the Bishop.

Curate or other newly ordained clergy regardless of job title: When a call to the Diocese of Texas has been issued and accepted a two-year License to Officiate will be issued. Upon completion of a year of employment, clergy may request to have their file reviewed and the Bishop will advise if he will accept Letter Dimissory or if he will require an additional year of employment. This timing may be shortened for clergy coming from other parts of the Anglican Communion. Alternatively, newly ordained clergy who wish to have their letters accepted sooner can request that their canonical file, including psychological exam, be sent to the Diocese.

Deacon: A clergyperson may not serve as deacon for more than two months unless he or she has been licensed in the Diocese of Texas. A deacon may not transfer Letters Dimissory without written consent from the Bishop of Texas. (TEC Canon III.7.6)

Interim/Retired Clergy: The Bishop does not accept Letters Dimissory for interim or retired clergy.

Clergy Benefits

Compensation and Review

The Church Pension Group (CPG) provides an interactive Compensation Report https://www.cpg.org/global/research/clergy-compensation-report/#/start where comprehensive compensation data is available to all clergy and church leaders for study and review. CPG is the source of the most accurate and timely information on clergy compensation. Further consultation in determining clergy compensation based on a comparative model may be requested by a vestry or Rector, by contacting the Canon to the Ordinary's office.

Health Insurance

Participation by full-time clergy in the diocesan health insurance is mandatory; premiums are paid through the assessment budget. As of March 2022, all full-time employed clergy will be covered with family coverage by the Diocese. Please contact Zee Turnbull, Director of Human Resources, or Christine Faulstich, Canon to the Ordinary, with questions.

Pension Contributions

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

Business Expenses

Office and business expenses, including auto/travel allowances, are not a part of a clergyperson's compensation package, but are budgeted in the parish budget.

Vacation/Leave/Sabbatical

Scheduled Time Off: All clergy must have one day per week in which there are no scheduled duties or functions. The clergy must inform the congregation or place of employment of scheduled time off. This time must be respected. When clerical duties arise during clergy's scheduled time off, appropriate compensatory time is given.

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

Absenteeism: When clergy are absent from their place of employment or assigned duties on account of illness, death in the family, or for other compassionate reasons, they must obtain approval from their elected leadership or supervisors. Otherwise, stipend and allowances may be withheld for the period in question, if applicable.

Maternity Leave: All female clergy are entitled to a minimum of six weeks and a maximum of twelve weeks of maternity leave through the Short-Term Disability policy with no waiting period. Clergy must negotiate the length of leave with the Vestry, Rector, or other appropriate body. Please contact the Director of Human Resources for more information and assistance.

Paternity Leave: All male clergy are entitled to paternity leave for a birth or adoption of a child. They are entitled to three weeks of paternity leave with full pay. Please contact the Director of Human Resources for more information and assistance.

Clergy Supply: Clergy supply and pastoral services are funded by the place of employment during periods of clergy absence for vacation or continuing education. Clergy are expected to inform their elected leadership or supervisors at least 30 days prior to taking any vacation or continuing education time, if possible.

Continuing Education: Canonically, all clergy must meet an annual continuing education requirement. See *Continuing Education* for detailed requirements.

Letters of Agreement Provisions:

Full-time stipendiary priests and transitional deacons must have provisions in their Letters of Agreement for the following:

- Paid Vacation: Diocesan policy designates paid vacation of at least 30 days each year, including four Sundays (or primary Eucharistic celebrations). No restrictions are placed on how vacation is spent.
- Continuing Education: Diocesan policy designates 14 days, including two Sundays (or primary Eucharistic celebrations), each year for continuing education pursuits, with full pay and allowances.
- Clergy Sabbatical: "Sabbatical" is defined as a period of at least three months away from a priest's primary employer for the purpose of enhancing his/her ministry by a period of study, travel, reflection, and rest. Two weeks of cumulative sabbatical time will accrue each year. Accrual begins at the time of ordination and continues each year, regardless of the ministry location in the Diocese. A sabbatical can be taken after the completion of six years of ordained ministry. The sabbatical will be with full pay and allowances and may be taken in conjunction with annual vacation and continuing education time. Sabbatical grants are available. To request a sabbatical grant, please contact the Rt. Rev. Jeff W. Fisher, jfisher@epicenter.org. (Also see Sabbaticals.) Clergy are expected to return and serve at least one year following their sabbatical. Sabbaticals are not an earned benefit to be paid out upon resignation.

Part-time stipendiary priests must have provisions in their Letters of Agreement for the following:

- Paid Vacation: Diocesan policy designates paid vacation, including four Sundays (or primary Eucharistic celebration days), with the total number of days proportionate to the number of days contracted to work per year, as compared with the full-time allotted vacation of 30 days per year. No restrictions are placed on how vacation is spent.

- Continuing Education: Diocesan policy designates seven days, including two Sundays (or primary Eucharistic celebration days), each year for continuing education pursuits, with full pay and allowances.

Vocational deacons and bi-vocational priests must have provisions in their Letters of Agreement for the following:

- Vacation: Diocesan policy designates vacation of four Sundays (or primary Eucharistic celebration days) away from the congregation. No restrictions are placed on how vacation is spent.
- Continuing Education: Diocesan policy designates two Sundays (or primary Eucharistic celebration days) each year for continuing education pursuits.

Retired Clergy Active in Ministry

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

> When clergy retire, they may serve in the Episcopal Church and continue to receive pension benefits as long as:
>
> They are in good standing with the Episcopal Church
> They will not be working in the church or institution from which you have retired
> Their total compensation from Episcopal Church-related income does not exceed $37,200 for any 12 month period, effective January 1, 2016.
>
> If they are age 72 or older, they may serve in the Episcopal Church with no restrictions on income.

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

Supply Clergy Policy

According to Canon 10.4, the senior Warden or Bishop's Warden is responsible for arranging for supply clergy. A list of clergy who are available to supply and the current standard rates for hiring supply clergy are available on the on the diocesan website at www.epicenter.org/for-leaders/transition-ministry/. To be added to the Supply Clergy List, please direct requests to the Canon to the Ordinary, cfaulstich@epicenter.org.

Diocese of Texas non-parochial clergy and licensed clergy are eligible to supply, provided they are in good standing with the Bishop and meet the *Expectations of Clergy*, including *Background Checks and Sexual Abuse Prevention*.

Interim Clergy

Please direct questions regarding interim ministry to the Canon for Transitions.

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

5 - Continuing Education for Clergy

Updated February 2024

Seeking the knowledge of such things as may make us stronger and more able ministers of Christ.

Reporting Requirements

The reporting year runs from September 1 to August 31. Starting in 2024, Continuing Education Units (CEUs) may be reported online through the USHER portal as they are earned throughout the reporting year. All CEUs must be entered no later than September 30 following the completing of the year in which they are earned. Supporting documentation to verify attendance is not required.

Number of CEUs Required

The number of CEUs required each year by a member of the clergy varies according to the categories described below. (See below for the minimum requirements for each of the three Educational Competencies.) Excess CEU hours earned in reporting year do not roll over for credit into the next annual cycle.

Full Time Stipendiary Clergy **24 CEUs**

Includes clergy serving both congregations and other institutions, such as hospitals and schools.

All Other Clergy Exercising Ordained Ministry within the Diocese **12 CEUs**

Includes all clergy who are active but not working full-time, including supply clergy, bi-vocational priests, deacons, chaplains, and retired clergy who continue to work part time.

Canonically Resident Clergy Not Living or Serving in the Diocese **Exempt**

Fully Retired, Non-Active Clergy **Encouraged but not required**

Continuing Education Unit (CEU)

The standard for one CEU in the Episcopal Diocese of Texas is one contact hour between the instructor and student in a learning situation that supports leadership, professional, theological or personal development. This may include one on-one instruction, online learning (including webinars), classroom learning, conferences, small group collaborative work, facilitated clericus groups, and the educational component of religious pilgrimages. Independent study, personal spiritual retreats, work with a counselor, and spiritual direction also qualify.

Opportunities that *do not qualify* for CEUs include worship and fellowship, breaks, and mealtime during a class, conference, or retreat. Also excluded are classes to become proficient in hobbies or second careers.

Clergy who serve in professional religious capacities that require continuing education from another licensing/certification agency, such as hospital chaplains and heads of schools, may apply continuing education credits required by those agencies to the CEU requirements of the Diocese of Texas, provided that the credits meet the contact hour requirements of the diocese.

Maximum CEU Credits per Activity

- 12 CEUs- for each academic course taken from accredited institutions; independent study; participation in a single event or learning opportunity; one-on-one work with counselors
- 10 CEUs - for participation in facilitated clericus meetings
- 6 CEUs - for full participation in the annual clergy conference or participation in a spiritual retreat
- 3 CEUs - for full participation in the annual retreat/conference for retired clergy and spouses; chaplain in residency week at Camp Allen; research and work done to develop new curriculum/courses for instruction

Educational Competencies

The three competency areas include: **Theological/Academic; Professional; Personal.** Clergy must complete at least 3 CEUs in each competency area during an annual cycle. It is recommended that the 24 CEU annual cycle requirement be balanced with 8 CEUs in each of the three competency areas.

Examples of topics/learning opportunities included under each Educational Competency are listed below*:*

Theological / Academic

All seminary offerings
Biblical studies
Doctorate in Ministry programs through accredited institutions
Languages - Spanish, Greek, Hebrew, etc.
Ethics
Church history
Arts and theology, etc.
Overview of contemporary works
Science and religion issues
Seminars with theologians
On-line learning, webinars, and podcasts

Professional

Congregational development
Leadership skills or development
Community outreach
Safeguarding Training
Conflict management
Antiracism training
Racial reconciliation
Staff management, team building
Stewardship, fund raising
Creating a missional community

Personal

Clergy wellness programs
Counseling to deal with personal issues
Mind, body, and health awareness
Maintaining balance in work and life
Personal financial management
Spiritual retreats
Spiritual direction
Coursework to assist in self-awareness of strengths, challenges, gifts, etc.
On-line offerings and support

Independent Study

There are occasions when a clergy person has an unusual learning opportunity that falls outside the mainstream of situations listed in these guidelines. This might include a directed or self-directed course of study which incorporates numerous books/articles around a particular topic or work done with experts or consultants.

6 - Worship

All canons governing worship are found in Title II of the Constitution & Canons of the Episcopal Church as adopted and revised by General Convention 2015

Prayer Book

The 1979 *Book of Common Prayer* (*BCP*) is the standard prayer book for worship. The *BCP* is to be used at the principal services on Sunday morning.

Trial Use

Congregations may request permission from the Bishop for trial use of materials approved by General Convention pursuant to Article X of the National Constitution.

Enriching Our Worship

The *Enriching Our Worship* series may be used for worship that is not the principal worship service on Sunday. If you wish to use *Enriching Our Worship* for special services at which a bishop will be present, such as a celebration of new ministry, please consult the participating Bishop well in advance of the service for his or her guidance and permission.

Anglican Prayer Books

Permission must be requested of the Bishop in writing for the use of any prayer book other than the *BCP* for principal Sunday worship.

Permission is granted for congregations to use current prayer books from other churches of the Anglican Communion for services other than the principal Sunday service.

Marriage and Remarriage

Canons governing remarriage are found in TEC Canon I.19.2-3. Clergy are responsible for knowing the requirements and initiating communication with the Office of the Bishop. *(See Remarriage Petitions.)*

Baptism/Confirmation/Reception

Canons governing baptism, confirmation, and reception are found in TEC Canon I.17.

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

Adult Members: Members 16 years of age and older are considered adult members.

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

Reception: Adults who are baptized and who have been confirmed by bishops of churches in historic succession as well as adults who are baptized and previously made a mature public commitment in another church may be received or confirmed. If an adult was confirmed by clergy other than a bishop, including those confirmed by priests in the Roman Catholic Church, he or she should be confirmed rather than received.

Reaffirmation: Reaffirmation is for adults who wish to reaffirm their baptismal commitment to follow Jesus Christ as Lord and Savior.

Deacon's Mass

Deacon's masses are not authorized.

Rubrics for a Deacon Performing a Marriage in the Diocese of Texas

1. A deacon needs the permission of the Bishop to preside over the Celebration of a Marriage. In cases when the marriage is to take place in a sanctuary, permission of the rector or vicar must also be obtained. If a priest is available, a deacon should not preside, but can do parts of the service that express the pastoral relationship with the couple.
2. When presiding over a marriage, a deacon should use the traditional liturgy beginning on page 423 of the BCP with the understanding that the nuptial blessing, which follows the Prayers on page 431 of the BCP, is to be omitted.
3. When a deacon presides at a marriage for a couple connected to an Episcopal congregation, the deacon should encourage the couple to get their marriage blessed by a priest at a later time.
4. A deacon must ensure that the engaged couple receive adequate pre-marital counseling and preparation.
5. In the case of a same-gender marriage, all guidelines with respect to Diocesan policy and approved liturgies apply and must be upheld.

Episcopal Visitations

All questions regarding episcopal visitations are to be directed to the assistant for the bishop who will be visiting. In order to facilitate a bishop's visit to the congregation the following information is offered:

Vision and Mission

When a bishop makes a parish visitation, he expects to meet with members of the parish during the visitation. The bishop also may request a meeting with the vestry to receive a presentation on the challenges and accomplishments of the parish. Please send the following ahead of time: core values, vision and mission statements, and goals.

Liturgical Readings and Colors

The readings should be those appointed for the day. The confirmation readings are only used for a weekday confirmation service at which there is no baptism. If confirmation occurs on a Holy Day, the Holy Day readings take precedence. For confirmation, the color should be the color of the day; for baptism with confirmation, the color is white.

Bishop's Chaplain

If present, a Canon of the Diocese shall be the Bishop's Chaplain. Otherwise, another person is to be appointed to serve in this capacity. It is expected that the deacon serve in the diaconal role and as chaplain. If there are two deacons, they may divide the role and the work. *Priests should not read the Gospel or say the dismissal if a deacon is present.*

Pew Bulletins

Please send an advance copy of the Order of Service (even if only a draft) to the visiting bishop and the bishop's assistant.

Parking Space

Please have a designated parking space clearly marked "Bishop."

Discretionary Fund Check

Please announce, in the bulletin and/or in the verbal announcements, that funds collected during a

Bishop's visitation will go to that Bishop's discretionary fund. Such funds are used in furthering their work for the mission of the Church. Please send one check from the congregation, payable to Episcopal Diocese of Texas, Memo - Bishop (Name's) Discretionary Fund. Mail to Office of the Treasurer, Episcopal Diocese of Texas, 1225 Texas Avenue, Houston, Texas 77002

Sample announcement for service bulletin or publicity:

"All funds collected during the offertory will be given to the Bishop ____'s discretionary fund, to be used as he/she determines will best further the mission of the Church and the Diocese of Texas."

Bishop's Customary, Visitation, and Confirmation Record Form

These forms should be sent in advance of a bishop's visitation. For information about the forms or other questions, please contact the assistant to the bishop who will be visiting. (See Diocesan Staff and Functions).

Expectations Regarding Bishops Visiting from Outside the Diocese

Episcopal or Anglican bishops from outside the Diocese may be invited to visit congregations and may preach and/or teach. Confirmations and ordinations are reserved for the Bishops of Texas, except when express permission has been extended by Bishop Doyle. When a Bishop from outside the Diocese will be present in a congregation, the rector or vicar should inform Bishop Doyle's office well ahead of the visit. In the event that the bishop is a primate from another Anglican province, courtesy suggests that the Office of the Presiding Bishop be informed of the visit and any planned public events (including worship).

7 - Marriage

Remarriage for Church Members
Questionnaire and Petition

NOTE: All petitions should be submitted at least 30 days prior to the proposed blessing date. Please submit petitions by email to Sara Marlatt, Executive Assistant to the Bishop Diocesan, smarlatt@epicenter.org. The petition can be sent as the body of an email, and it is helpful to use the numbered list below as a template for the petition.

The petition must be addressed to The Rt. Rev. C. Andrew Doyle, must be signed by the petitioning clergyperson, and must include the following information:

1. The full names and ages of both parties to the proposed marriage
2. The name(s) of the Episcopal congregation(s) in which these persons are active members
3. The date and location of the proposed wedding
4. The name(s) of the former spouse(s)
5. The date(s) of the final divorce decree(s): For a second marriage, a waiting period of one year from the date of the final decree is normally required. If a lengthy separation (in excess of two years) has occurred, a six-month waiting period *may* be granted. NOTE: If the clergyperson making the request has seen a copy of the divorce decree, it is not necessary to include a copy of the decree with this petition.
6. If any children of the divorced spouse are minors, a statement of the court-ordered financial arrangements for their support and whether all such payments are current.
7. Based upon counseling with the couple, a statement from the clergyperson as to why the prior marriage(s) failed; why the couple feels the proposed marriage will be different; and how the couple intends to place God at the center of their marriage and home.
8. Based upon your counseling with the couple, a statement from the clergyperson affirming their conviction that the petition should be granted and giving reasons for this opinion.

In the event of a third marriage by either party, the parties to the proposed marriage must consult with a licensed marriage therapist as to their readiness for marriage. The written opinion of the therapist must be conveyed to the petitioning priest and included with the petition to the Bishop.

Insofar as fourth marriages by either party are concerned, no petitions will be considered except under *very* unusual circumstances.

Regarding the blessing of marriages performed by civil authority, the Diocesan Guidelines state: “Marriages may be blessed for those who marry outside the Church once sufficient time has elapsed that would have made it possible for them to apply for remarriage in the Church according to the regular Diocesan Guidelines.”

Only a priest can serve as the petitioner in a request for a marital judgment. Letters written by others cannot and will not be considered.

NOTE that if the priest making the judgment is not the head of the congregation in which the proposed ceremony is to take place, there must also be a letter or email from the head of congregation assuring the Bishop of their concurrence with the petition.

Marriage Policy for Gender and Sexual Minority Couples

The rules and regulations around Christian marriage regarding remarriage petitions, pre-marital counseling, and timing apply equally to all weddings. No clergy are required to perform any weddings, as Episcopal polity gives each clergy the discretion to decline or solemnize any marriage.

Congregations that desire to have weddings for gender and sexual minority couples performed in their sanctuary are expected to undergo a process of formation and discernment. Once a congregation reaches consensus to perform weddings for gender and sexual minority couples, they should let the Bishop know.

For rectors and heads of congregations in places where the formation/discernment process has not happened, these priests may perform weddings for gender and sexual minority couples in non-church locations. Associates at such parishes must be in conversation with the rector before performing these and all weddings.

Retired and Non-parochial clergy may perform weddings for anyone. They must have the permission of the rector or head of congregation for weddings in Episcopal sanctuaries.

The Bishop and canons expect that clergy who do not perform weddings for gender and sexual minority couples will assist couples in accessing the sacrament by reaching out to the Bishop's office when these situations arise.

In the end the Bishop expects his clergy to act in accordance with their conscience, to understand and respect the viewpoint of those who see this issue differently, and to adopt a posture of humility and grace. A posture of humility requires clergy to place their perspective and practice with respect to all weddings behind our common commitment to God's mission of reconciliation.

8 - Clergy Marriage, Divorce and Remarriage

This policy is based upon TEC Canon I.19.

Clergy Marriage and Remarriage

The Bishop expects that any clergyperson, when considering marriage, will meet with him for consultation before proceeding. In the case of remarriage, all the provisions found in *Remarriage Petitions* will also apply to clergy.

Clergy Marriage

All members of the clergy, having subscribed to the Declaration required by Article VIII of the Constitution of the Episcopal Church, shall be under obligation to model in their own lives the received teaching of the Church that all of its members are to abstain from sexual relations outside marriage.

Marriage shall mean the physical and spiritual union between two persons entered into within the community of faith, by mutual consent of the heart, mind, and will, and with intent that it be lifelong.

Clergy Divorce

If the marital relationship between a clergyperson and spouse is threatened, it is expected that they will counsel with the Bishop, who will aid and support them in seeking appropriate professional help toward reconciliation.

If every effort to preserve the marriage fails, and either spouse seeks a divorce, the clergyperson shall immediately inform the Bishop.

9 - Addiction and Gambling Policies

Addiction Policy

The Diocese of Texas will follow the outlined guidelines for clergypersons who experience chemical abuse or dependency:

- Exploratory questioning about chemical abuse or dependency;
- Consideration of a formal chemical dependency assessment from a credentialed chemical dependency treatment specialist;
- For consideration for employment, the person will be assessed after a period in the range of two to five years, depending on the following:
  - motivation to obtain assessment and treatment
  - response to treatment of not less than two years of sobriety
  - achievement of sobriety
  - record of relapse prevention

Gambling Policy

Gambling is defined as participation in any game or activity where money or objects of value may be won by chance.

Gambling must not be a regular or frequent part of the activities of any congregation, school, or diocesan institution. Occasional special events or fundraisers that include bingo or a raffle are permissible, provided the value of any prize does not exceed the $600 IRS reporting threshold.

This policy applies to any event or activity of a diocesan institution, congregation, or church-related entity such as a school, youth group, outreach ministry, and the like, regardless of the location of the event or activity.

All congregations, diocesan institutions, schools, and church-related entities must comply with this policy if any form of gambling is permitted at all.

10 - Alcohol Policy

The Episcopal Church and the Episcopal Diocese of Texas acknowledge the dangers of alcohol abuse, the seriousness of the illness of substance use disorder as a disrupter of family, economic, and social life, and the need to exercise a healing ministry and offer support to victims of addiction and to their families. Although the responsibility for drinking alcohol always rests with the individual, the Diocese intends by this policy to create an atmosphere where alcohol is not normalized as essential to celebrations, where people who do not drink alcohol feel fully welcomed into the community, and where leadership is encouraged to address the abuse of alcohol when it occurs.

It is the responsibility of the vestry or bishop's committee of each congregation and the board of each school or other diocesan organization to develop, adopt, and publicize a policy in accordance with these guidelines for the use or prohibition of alcoholic beverages. The Recovery Commission of the Diocese of Texas and the diocesan office of Wellness and Care can serve as resources in implementing this policy.

Use of Alcoholic Beverages in Institutions (including churches) of the Diocese of Texas

Unless otherwise provided, the following guidelines do not apply to the serving of wine at the Eucharist.

1. The institutions of the Diocese of Texas must provide a safe and welcoming environment for all people, including people in recovery.

2. Property owned, leased for the use of, or otherwise under the control of the institutions of the Diocese of Texas may not be used for events at which alcohol is the primary attraction, whether sponsored by the institution or by a person, group, or organization with which the diocesan institution is partnering or to which the institution has granted use of the property.

3. All applicable federal, state, and local laws must be obeyed, including those governing the serving of alcoholic beverages to minors and those forbidding the sale of alcoholic beverages without an appropriate license.

4. Some congregations, schools, or other diocesan organizations may decide not to serve alcohol at events or gatherings. Others may decide to permit a limited use of alcoholic beverages at sponsored events. Both can be appropriate if approached mindfully.

5. When alcohol is served, it must be monitored and those showing signs of intoxication should not be served. There should be an appropriate amount of alcohol for the number of people present and moderation is expected. Therefore, there should never be 'unlimited refills' or similar situations where excessive alcohol consumption is allowed or encouraged. Whenever alcohol is served, the head of congregation, school, or other diocesan organization must appoint a sufficient number of adults to oversee its serving. Those adults must not drink alcoholic beverages during the time of their execution of their responsibilities. If hard liquor is served, a certified server is required. Certified servers are also recommended for beer and wine at large events opened to the public.

6. Serving alcoholic beverages at events where minors are present is strongly discouraged. If minors are present, alcohol must be served at a separate station that is monitored at all times to prevent underage drinking.

7. Alcoholic and non-alcoholic beverages must be clearly labeled as such. Food prepared with alcohol does not need to be labeled provided the alcohol is completely evaporated by the cooking process (although it is recommended that the use of alcohol in cooking be noted on a label even in such cases).

8. Whenever alcohol is served, appealing non-alcoholic alternatives must always be offered with equal prominence and accessibility.

9. The serving of alcoholic beverages at sponsored events should not be publicized as an attraction of the event, e.g. “wine and cheese reception,” “cocktail party,” or “beer and wine tasting.”

10. Ministries on campus or off campus of congregations, schools, or other diocesan organizations will make certain that alcohol consumption is not the focus of the ministry.

11. Food must be served when alcohol is present.

12. In congregations, the groups or organizations sponsoring the activity or event at which alcoholic beverages are served must have permission from the head of congregation or from the vestry or bishop’s committee. Such groups or organizations must also assume responsibility for those persons who might become intoxicated and must provide alternative transportation for anyone whose capacity to drive may be impaired. Consulting with liability insurance carriers is advised.

13. Participating and/or partnering with businesses or non-profits while hosting events does not exempt a congregation from these guidelines.

14. Recognizing the effects of alcohol as a mood-altering drug, alcoholic beverages shall not be served when the business of the Church is being conducted.

15. Clergy shall consecrate an appropriate amount of wine when celebrating the Eucharist and perform ablutions in a way that does not foster or model misuse.

16. We encourage clergy to acknowledge the efficacy of receiving the sacrament in one kind.

17. It is expected that the leadership of each congregation will be aware of local resources and programs that can provide assistance to persons struggling with addiction and to their families.

11 - Parish Administration

Finance and business administration matters are handled through the Office of the Treasurer, Linda R. Mitchell, Chief Financial Officer (CFO), lmitchell@epicenter.org.

Clergy Pension

The Church Pension Group has a website for information regarding benefits. Participants may choose to personalize their information and track their benefits on a regular basis. www.cpg.org

Health Insurance

Zee Turnbull administers health insurance in the diocesan office. Please contact her with questions or help in understanding benefits, zturnbull@epicenter.org.

Property Insurance

Jonathan Blaker is the diocesan coordinator for property insurance. jblaker@epicenter.org

Episcopal schools, day care centers, nursing homes, and camps will be on separate policies obtained with Church Insurance Corp. or the insurance company the institution chooses, as long as they are in compliance with the EDOT canons, which require that adequate insurance coverage be held on all church property.

Any congregation or institution not using Church Insurance Corp. for coverage must provide a copy of its insurance policy to David Fisher for review.

Sanctuaries

Churches may not “rent out” sanctuaries for weddings or other religious services not being led by Episcopal clergy unless specific permission is granted by the Bishop Diocesan.

Third Party Lease Agreements

If a congregation wishes to enter into an agreement with a prospective third-party tenant involving the leasing all or a portion of the church campus, before entering into such an agreement the rector or senior warden must contact David Fisher in the Foundations Office, 713-520-6444. All third-party lease agreements must be approved by the Church Corporation. Third party leases create an encumbrance on the property, which requires by Canon the authorization of the Church Corporation.

Bonding

Vestries and Bishop’s committees are responsible for insuring that both the treasurer and business administrator, if applicable, of the congregation are bonded for a minimum of $250,000.

Treasurers

It is suggested that all church treasurers submit to a background check. All church-plant and mission treasurers are required to submit to a background check. Requests for background checks shall be made to Millie

Longoria, mlongoria@epicenter.org. The cost of the background check is expected to be covered by the congregation; however, if it is a hardship, they may request financial assistance from the diocese.

Audits

Every congregation and institution must have an annual audit. (Diocese of Texas Canon 13.5)

In implementing this canon, the Executive Board has adopted a procedure whereby an audit committee of individuals from the congregation may be authorized to perform the annual review of the financial records of any congregation or institution. For these guidelines, contact the controller.

The diocesan controller is also available to assist with questions or inquiries.

Parochial Report

The requirement to file a parochial report is outlined in TEC Canon I.6. Each church is required to file the report online. The diocesan staff can access the report after a church has marked it as complete.The diocesan office does not require submission of a hard copy.

The diocesan deadline for filing is earlier than the filing deadline for the national church. In this Diocese, the parochial reports are due before our Annual Diocesan Council. Failure to file the report prior to the Annual Diocesan Council can cause the affected church to have seat but no voice or vote.

Each year, the General Convention Office sends email notifications to congregations with the date that the parochial report filing system opens. Do not use the national church deadline or the report will not be submitted by the diocesan deadline.

Please address questions to Nina Gaspar, ngaspar@epicenter.org.

Discretionary Funds

Discretionary funds rest on the canonical authority embodied in the Canons of the Episcopal Church, TEC Canon III.9.6(b)(6).

Authority:
The alms and contributions, not otherwise specifically designated, at the administration of Holy Communion on one Sunday in each calendar month, and other offerings for the poor, shall be deposited with the clergyperson in charge of the parish or mission or with such church officer as shall be appointed by him, to be applied by him or under his supervision, to such pious and charitable uses as shall be fitting. During a vacancy, the vestry shall appoint a responsible person to serve as almoner.

Sources:
The sources of discretionary funds vary. The TEC canon referenced above is generally interpreted to mean that at a minimum of one Sunday a month, the loose offering at the Holy Eucharist is first deposited with the parish treasurer and then set aside for the rector's discretionary fund. In some parishes, the loose offering at all services of the Holy Eucharist on a designated day is set aside for the rector's discretionary fund. Some congregations have trusts, the income from which is designed for the discretionary fund. Other congregations set aside a budgeted amount for the discretionary funds of the clergy in addition to the traditional sources or as a substitute for them.

Clergy:

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

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

Records:
Some congregations maintain the discretionary fund as a line item in the parish books, and the parish treasurer draws checks on vouchers signed by the clergy. This form of recordkeeping is the safest method of ensuring adequate records. When the clergyperson controls the checkbook of the discretionary fund, it is required that all contributions to the discretionary fund be made payable to the church, recorded in the books of the church, and then subsequently transferred by the treasurer to the discretionary fund.
Clergy who maintain their own checkbooks for discretionary funds are required to record the purpose of every check drawn on the account and the source of all deposits into it.
If a clergyperson receives a check payable to the church, with no other designation, the clergyperson is required to deposit it with the parish treasurer and receive vestry authorization before that money is deposited into the discretionary fund.

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

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

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

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

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

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

Accountability:
The discretionary fund account is to be reviewed on a confidential basis, as part of the annual audit. Ideally,

a representative of the firm doing the audit would have a private conference with the priest. In other cases, it may be more practical for the Senior Warden or some other responsible member of the congregation to serve in this role.

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

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

Income Tax:
Since the discretionary fund is to be used for the benefit of the church, it is not subject to income tax. Members of the clergy who improperly use discretionary funds for personal use may be subject to income tax reporting requirements, as well as ecclesiastical, civil, and/or criminal penalties.

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

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

Resource:
<u>The Episcopal Church Manual of Business Methods in Church Affairs,</u> Chapter Five.

<u>Nepotism</u>

To avoid the appearance of favoritism and conflicts of interest, the employment of relatives of clergy (those related by blood or marriage) in the same congregation is strongly discouraged. This includes employment on the church staff, school staff or faculty, or other church-related organizations. Any exceptions to this policy must be approved in writing by the Bishop Diocesan.

Clergy couples desiring to serve in the same congregation may do so subject to a written agreement negotiated between the clergy persons, the vestry, and the Bishop Diocesan.

With the exception of clergy couples, no relative of a clergy person shall be employed in any capacity that results in a direct or indirect supervisory or reporting relationship to the clergy person.

No relative of a clergy person shall serve in any financial capacity in the congregation including, but not limited to, signing checks or as a member of the finance committee or personnel committee.

For laypersons, relatives shall not be employed in the same congregation if it results in a direct or indirect supervisory or reporting relationship.

No current employee, or any relative of a current employee, shall serve on the vestry, the Bishop's committee, or on the Nominations committee of the Annual Diocesan Council.

Master Planning, Design, Capital Fundraising, Financing, Renovation, Repurposing, and Construction

The Diocese maintains a list of individuals and firms with proven experience working with congregations for the planning, design, and construction of new facilities, renovation/repurposing of existing facilities, and the capital stewardship campaigns to support such efforts.

Please contact Michael Hilfinger in Finance for a copy of the latest version of *"Church Renovation, Remodeling, Master Planning, Real Estate Transactions, & Construction - Requirements and Guidelines for Congregations."* This document provides detailed information on the steps involved, key diocesan resources, information on financing sources and debt limit guidelines, budgeting suggestions, and an overall project timeline.

While the decision to hire a particular individual or firm for such purposes is rightly made by the appropriate leadership of the local congregation, the Diocese stands ready to assist and advise. Mission Amplification is available to share its experience, recommendations, expertise, and guidance in the early stages of a congregation's consideration of major renovations, major maintenance, master planning, architectural design, construction, and capital fund drives.

As a reminder, all congregations are required to receive the approval of the Protestant Episcopal Church Council of the Diocese of Texas ("Church Corp.") prior to buying or selling land, borrowing money (in which either the property or a negative pledge on the property would be used as collateral to secure the loan), leasing church property or building space, entering into an agreement that would create an encumbrance on the church property (e.g. construction or installation of columbarium or memorial garden, Easement Agreements, Cell Tower Leases, Encroachment Agreements, etc.), or making commitments or initiating projects involving demolition, major renovation, or construction of new facilities.

Conflicts of Interest Policy

Each head of congregation is responsible for ensuring that the congregation and any affiliated school or other entity, particularly those incorporated as tax-exempt organizations under section 501(c)(3) of the Internal Revenue Code, has, either in its bylaws or separately, a conflict of interest policy substantially similar to the following:

Section 1 - Purpose

The purpose of the conflicts of interest policy is to protect the corporation's [if your congregation, school, or other entity is not incorporated, substitute the name of the entity] interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the corporation or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflicts of interest applicable to nonprofit and charitable organizations.

Section 2 - Definitions:

a. Interested Person:
   Any director, principal officer, or member of a committee with board-delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.
b. Financial Interest:

A person has a financial interest if the person has, directly or indirectly, through business, investment or family:

1. an ownership or investment interest in any entity with which the corporation has a transaction or arrangement,
2. a compensation arrangement with the corporation or with any entity or individual with which the corporation has a transaction or arrangement, or
3. a potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the corporation is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the board or appropriate committee decides that a conflict of interest exists.

Section 3 - Procedures:

a. Duty to Disclose:
In connection with any actual or possible conflicts of interest, an interested person must disclose the existence of his or her financial interest and must be given the opportunity to disclose all material facts to the directors and members of committees with board-delegated powers considering the proposed transaction or arrangement.
b. Determining Whether a Conflict of Interest Exists:
After disclosure of the financial interest and all material facts, and after any discussion with the interested person, the interested person shall leave the board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.
c. Procedures for Addressing the Conflict of Interest:
    1. An interested person may make a presentation at the board or committee meeting, but after such presentation, such person shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
    2. The board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the corporation's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.
d. Violations of the Conflicts of Interest Policy:
    1. If the board or committee has reasonable cause to believe that a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
    2. If, after hearing the response of the member and making such further investigation as may be warranted in the circumstances, the board or committee determines that the member has in fact failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Section 4 - Records of Proceedings:
The minutes of the board and all committees with board-delegated powers shall contain:

a. the names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the board's or committee's decision as to whether a conflict of interest in fact existed; and

b. the names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection therewith.

Section 5 - Compensation Committees:

a. A voting member of the board of directors who receives compensation, directly or indirectly, from the corporation for services is precluded from voting on matters pertaining to that member's compensation.
b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the corporation for services is precluded from voting on matters pertaining to that member's compensation.
c. No voting member of the board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the corporation, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

Section 6 - Annual Statements:

Each director, principal officer, and member of a committee with board-delegated powers shall annually sign a statement affirming that such person:

a. has received a copy of the conflicts of interest policy;
b. has read and understands the policy;
c. has agreed to comply with the policy; and
d. understands that the corporation is a charitable organization and that in order to maintain its federal tax exemption it must engage primarily in activities that accomplish one or more of its tax-exempt purposes.

Section 7 - Periodic Reviews:

To ensure that the corporation operates in a manner consistent with its charitable purposes and that it does not engage in activities that could jeopardize its status as an organization exempt from federal income tax, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and are the result of arm's-length bargaining.
b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the corporation's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

Section 8 - Use of Outside Experts:

In conducting the periodic reviews provided for in Section 7, the corporation may, but need not, use outside advisors. If outside experts are used their use shall not relieve the board of its responsibility for ensuring that periodic reviews are conducted.

12 - Appendices

Appendix A Addresses & Links

Episcopal Church Center
Episcopal Relief & Development
815 Second Ave, New York, NY 10017
800-334-7626, www.episcopalchurch.org

Church Pension Group
445 Fifth Ave, New York, NY10016
800-223-6602, Fax: 212-592-9400
www.cpg.org

Church Insurance Corporation
Contact: John Scheffler, VP Client Services
940-241-2803, Fax: 940-241-2820
jscheffler@cpg.org

The Bishop Quin Foundation
Episcopal Foundation of Texas
Great Commission Foundation
Church Corporation
Contact: David Fisher, Diocesan Center
1225 Texas Ave, Houston, TX 77002
713-520-6444, Fax: 713-521-2218
dfisher@epicenter.org

Episcopal Heath Foundation
Dr. Ann Barnes, President and CEO
500 Fannin St, Ste 300, Houston, TX 77002
713.225.0900, www.episcopalhealth.org

Camp Allen
Allen Kight, President
18800 FM 362, Navasota, TX 77868
936-825-7175, www.campallen.org

Anglican Communion
www.anglicancommunion.org

National Church Offices
www.episcopalchurch.org

Episcopal Diocese of Texas
www.epicenter.org

Constitution & Canons - Diocese of Texas
www.epicenter.org/about/governance/constitution-and-canons/

St. Vincent's House
Paula Tobon-Stevens, Executive Director
2817 Post Office St, Galveston, TX 77550
409-763-8521, Fax: 409-763-0572
www.stvhope.org

Episcopal High School
Ned Smith, Head of School
4650 Bissonnet St, Bellaire, TX 77401
PO Box 271299, Houston, TX 77277
713-512-3400, www.ehshouston.org

St. Stephen's School
Chris Gunnin, Head of School
6500 St. Stephens Dr, Austin, TX 78746
512-327-1213, Fax: 512-327-1311
www.sstx.org

Seminary of the Southwest
Dr. Scott Bader-Saye, Dean & President
606 Rathervue Pl, Austin, TX 78705
P.O. Box 2247, Austin, TX 78768
512-472-4133, www.ssw.edu

El Buen Samaritano
Rosamaria Murillo, Ph.D., LMSW
Chief Executive Officer
7000 Woodhue Dr, Austin, TX 78745
512-439-0700, www.elbuen.org

Constitution & Canons - TEC
to read online: www.episcopalchurch.org
to order: www.churchpublishing.org

Office for Transition Ministries
www.episcopalchurch.org
www.otmportfolio.org

Appendix B

Commission on Ministry

The Diocese of Texas offers three tracks for ordination: deacon, priest, and bi-vocational priest.

Deacons and bi-vocational priests are locally prepared through the Iona School for Ministry. *See Expectations of Bi-Vocational Priests, p. 2.7, and Expectations of Vocational Deacons, p. 2.8.*

Bishop Kathryn M. Ryan serves as the Executive for Ministry, the Reverend John Newton is Chair of the Commission on Ministry, and the Reverend Jan Halstead is Chair of the Committee for the Diaconate.

Application materials are available from the Commission on Ministry office in Austin. All requests for applications and general inquiries may be directed to Ms. Ana Gonzales May, who is the Assistant to the Commission on Ministry agmay@epicenter.org.

Identification of Nominees for Ordination

The Commission on Ministry seeks persons of spiritual maturity and commitment who have proven leadership abilities and who have discerned a call to ordination. All clergy are to nurture possible vocations to ordained ministry, being attentive to persons in the local setting who may have such gifts. The Commission on Ministry can provide additional guidance if needed, as well as materials for the recommended Discovery retreat and the discernment process. For a broad overview of the process and steps for ordination in the Diocese of Texas, please visit: www.epicenter.org/discernment/ordination-process/.

Be advised that certain policies are in place related to eligibility to enter the process. Persons with three divorces will not be considered, and a high level of debt is a barrier to entering the process. Candidates for the seminary track must be geographically mobile in order to relocate with their families for seminary and for eventual placement; if a candidate is not mobile, consideration should be given to the bi-vocational track.

Bi-vocational priests and deacons are not expected to relocate.

In addition to identifying potential nominees for ordination, clergy also have the responsibility of redirecting those aspirants whose gifts do not suggest an ordained vocation. Assistance should be given in discerning the nature of their gifts and how those gifts may be developed and exercised in lay ministry.

Please direct all questions about the discernment processes to the Commission on Ministry office in Austin at agmay@epicenter.org or to the Reverend John Newton at jnewton@st-michaels.org. September 1st is the deadline for submitting a completed application for Holy Orders.

Appendix C

On Intellectual Honesty and Pastoral Integrity in Preaching

The formal proclamation of the gospel through the vehicle of preaching carries a weight of responsibility shaped by rules and expectations related to intellectual honesty as well as those impacting pastoral integrity. Both aspects define the acceptable use of materials within the sermon.

Pastoral Integrity

1) Congregations, individual worshipers, and the Church expect the preacher to invest his or her prayer, study, and time in the work of preparation for preaching, the most tangible element being the sermon as composed. Specifically, the Church expects the preacher, informed by the doctrine of the Church, to interpret the scriptures through the lens of life in a certain context, and to interpret life in a certain context through the lens of Holy Scripture.[1]
2) As a result, congregations listening to sermons receive them as the original work of the preacher, unless directly informed that the preacher is relying on someone else's work.[2]
3) The preacher violates the relationship of trust on which the pastoral relationship between preacher and congregation depends when she presents as the fruit of her own labors material that is the product of the creativity, research, or composition of another.[3]
4) For these reasons, the failure to acknowledge his reliance on sermons, stories, or exegesis drawn from websites, books, sermon collections (whether written or recorded), and other sources, damages the pastoral integrity of the preacher and the reputation of the congregation, diocese or institution with which the preacher is affiliated.

Intellectual Honesty

1) Intellectual property is protected by law in the United States, and habits of citation are designed to protect the author's rights to his or her own creative work.
2) Academic institutions, including seminaries, instruct students in the habits of citation in order to insure 1) that students do their own work, and 2) that authors and speakers receive the benefits of their own efforts.[4] More than simply an academic exercise within the school setting, the practices of citation and attribution are considered the norm for ethical persons in the United States whatever the setting in which they work.
3) Institutions, including congregations and seminaries, must also be concerned that copyright violations,

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[1] The Rev. Lisa Hunt and the Rt. Rev. C. Andrew Doyle, 3/5/14, email and personal conversations on the expectations of preachers.

[2] Ron Forseth, *Just What Is Pulpit Plagiarism?* Blog Post www.churchleaders.com/pastors/pastor-articles/138301-just-what-is-pulpit-plagiarism.html and from research and thoughts compiled by the Rt. Rev. C. Andrew Doyle, 3/4/14. Ron Forseth is Editor-at-Large for SermonCentral.com and ChurchLeaders.com.

[3] Ibid, Forseth says, "Using someone else's content extensively requires permission from both the source and from your audience."

[4] Dr. Haddon Robinson, public speaker and Christian apologist, offers the following definition of plagiarism: "In a world of preaching, a pastor who takes sermons from other preachers – word-for-word – without giving credit is guilty of plagiarism. That is stealing what is not yours." In Forseth's *Just What is Pulpit Plagiarism,* cited in 1 above.

whether in the use of music, images, movies, or sermons, may expose them to legal action and expenses.

4) Even the use of open source or "okay to copy" sermons and other materials without attribution violates the standards to which we expect preachers in the Diocese of Texas to adhere.

Basic Rules

Sanders L. (Sandy) Willson has been the senior minister of Second Presbyterian Church, Memphis, Tennessee since 1995. A well-known protestant preacher, he uses the following rules, applicable for our Diocese, as well:

1. "Any direct quote is always attributed to the author in full."
2. "Any ideas that I found in my reading that are uniquely attributable to one scholar or author are normally attributed to him."
3. "If there are a number of unique ideas from one author, I may make a general attribution to his overall influence on my thinking at the beginning of my sermon."
4. "Ideas that I discovered from several others that were not my own are usually covered by simply saying, "a number of scholars suggest that . . ."
5. "Books or articles that I have found helpful are often shared with the congregation for their own edification."
6. "If sermons are published or sold on websites or CDs, I must be even more scrupulous to acknowledge all of sources through footnotes and comments in order to avoid "stealing" from my brother or sister."[5]

In addition to Willson's six points, we would add that preachers who use sermons entirely or primarily drawn in structure and content from the work of another, must attribute them in a public way – verbally when preaching, or in the printed bulletin, and as a clear and obvious citation wherever a sermon appears on any website, social media post or preacher's blog. As Willson points out, if preachers or congregations record and place links on congregational websites to sermons preached by their clergy, but composed by someone else, preachers must be even more zealous to attribute appropriately.

A Word on Teaching

Much of what is written above on preaching could also be applied to teaching materials, though the temptation to present as original content created by others may not be as strong when we are at the lectern, as when in the pulpit. Even so, proper attribution is honest, transparent, and just plain good practice! Credit where credit is due, even when not demanded by the creator, please.

[5] Web article from Gospel Coalition: 5 Leaders Examine Plagiarism in Preaching
www.sermoncentral.com/articlec.asp?article=five-leaders-examine-plagiarism-in-preaching

Appendix D

Retirement from the Exercise of Ordained Ministry

I certify to the Bishop of Texas that I am completely retired from the exercise of ordained ministry in any context.

____
Signature

____
Printed Name

____
Date

MAIL TO: Bishop's Office
Attn: Kathryn Herman
1225 Texas Avenue
Houston, Texas 77002

EMAIL TO: kherman@epicenter.org

Appendix E

Clergy Manual Acknowledgment

_______ *I acknowledge receipt of the Clergy Manual dated* __________________ *(on the cover page).*

_______ *I will abide by the policies of the Bishop of the Diocese of Texas as provided in this Manual.*

_______ *I have read and understand the contents of this Manual.*

____
Signature

____
Printed Name

____
Date

MAIL TO: Bishop's Office
Attn: Kathryn Herman
1225 Texas Avenue
Houston, Texas 77002

EMAIL TO: kherman@epicenter.org