



Episcopal Diocese of Washington

Employment Policies and Guidelines for Clergy

PART 1 - CLERGY GUIDES

PART 1.1 - COMPENSATION, BENEFITS AND CONDITIONS OF EMPLOYMENT FOR CLERGY

1.1A - INTRODUCTION

As a general principle, the total compensation package of those in a supervisory capacity should not be less than their subordinates. For example, a rector's total compensation package should not be less than that of a musician, parish or school administrator, headmaster, or other church or school staff under his or her oversight. Similarly, care should be taken to insure that supply clergy and supply musicians are compensated equitably.

(1) OVERVIEW

While clergy salaries are often far below the salaries of persons with similar levels of education, responsibility and experience, their benefits are often considerably higher. If these benefits are not included, compensation should be increased to reflect their value. A typical clergy package will include:

CASH SALARY

HOUSING AND/OR EQUITY ALLOWANCE (often equal to or exceeding cash salary)

UTILITIES INCLUDING PHONE (whether or not the housing is in a rectory)

PENSION

HEALTH INSURANCE (for the full family), LIFE INSURANCE

DISABILITY

HALF OF SOCIAL SECURITY/SELF EMPLOYMENT TAX (SECA)

AUTOMOBILE ALLOWANCE

CONTINUING EDUCATION FUNDING AND TIME

VACATION, OTHER LEAVE, SABBATICAL TIME

CHILD CARE

This results in what could be called "clergy sticker shock." For example, one parish within this diocese pays its priest with nine years of ordained experience in a congregation with a budget of \$240,000 a cash salary of \$24,000. Quite affordable! However, this salary, combined with a housing allowance of \$24,000*, utilities averaging around \$3000, pension of \$9000, health insurance of \$7000, half social security tax (SECA) of \$750**, automobile of \$4000, continuing education of \$1000, means that the real cost of this clergy person is over \$71,750, not including supply clergy during times of vacation, spiritual refreshment, diocesan events and continuing education which can result in more than eight weeks away from the parish during the year.

* In this case the initial salary was \$32,000 with an initial housing allowance was \$16,000. For tax reasons, this clergy person had the vestry declare an additional of salary \$8000 as housing, the financial burden on the congregation remaining the same.

** This is the half of Social Security/Self-Employment Tax (SECA) paid by the congregation above and beyond salary. The other half is paid by the clergy person.

(2) PURPOSE

To provide guidelines for the use of parishes, separate congregations and missions in establishing salaries, benefits and working conditions for Episcopal clergy. The Guide provides minimum salary standards. Where possible and it is warranted, the Guide should be exceeded.

(3) DEFINITIONS

Compensation - Payment for the continuing discharge of ministerial responsibilities.

Compensation may be given directly into the possession or use of the clergy or it may be provided indirectly. It does not include reimbursement to clergy for costs incurred as a direct consequence of their responsibilities.

In this Guide, components of compensation are separately treated: Clergy Compensation is the sum of Cash Salary, Housing, and Utilities.

The clergy - Ordained priests or deacons canonically resident or licensed in the Diocese of Washington. They may be rectors (senior ministers of a parish or separate congregation), vicars (senior ministers of a mission station or chapel) or college chaplains. Or they may be assistants, associates, curates or those involved in other church related ministry.

Church related ministry - Post ordination service as a member of the clergy. In addition to service as rector, vicar, college chaplain and assistant and associate minister the following are included:

- Service as a military, hospital or school chaplain;
- Service as a missionary financially supported by a parish, diocese or other church body;
- Service on a diocesan or cathedral staff;
- Service as a teacher of religious subjects at a private school, a public or private college or university, or a seminary

Not included are the following:

- Federal, state or local government employment, including public school teaching, in a position other than that of a chaplain;
- Private practice as a counselor or therapist
- Writing and editing not related to included service

Vestry - Those persons directly responsible for the compensation of clergy, of whatever category.

(4) REFERENCES

Canon 25, section 6 - Clergy Election and Contracts (as published in the Journal)

Appendix B to the Canons of the Diocese - Guidelines for Clergy Contracts (as published in the Journal)

1.1C SALARY

(1) DEFINED

Salary, cash salary or stipend is the money regularly paid to the clergy in return for general and continuing ministerial services. Cash salary should not be less than the minimum base for the appropriate level of experience and size of parish. Changes in the cost-of-living will be reflected in the base salary recommended in the annual revision of the Guide. Cash salary is to be stated in yearly terms and paid at regular intervals in twelve or more equal amounts.

The Salary Guide describes how to determine a starting point for salary negotiations with a rector and for assistants with three or less years of experience. Assistants with more than three years of experience are often charged with substantial levels of parish-wide responsibility, including supervisory responsibilities for professional staff, and are likely to be “Associate Rectors.” Salary for such positions should be negotiated with the rector and vestry and a reasonable starting base would be the column of the table below that used in determining the rector’s cash salary. For instance, if the congregation has an annual income of \$150,000 to \$300,000, column C, the B column should be used as the base of negotiations for the assistant or associate’s cash salary.

Parish income used to identify the applicable columns in the clergy compensation table is “Normal Operating Income” as reported in the annual parochial reports. It is suggested that parishes monitor their Normal Operating Income trends. When those trends indicate that a parish will move from one column to the next, phasing the clergy cash salary implications over a two-three period may be helpful for budgeting purposes. In parishes that have multiple revenue centers (such as a school or cemetery), it is recommended that additions to clergy compensation (including pension premiums) be funded by those revenue centers in relation to the degree of clergy involvement required in the centers’ operations.

(2) HOW TO USE THE CASH SALARY TABLE

(a) When calling clergy to a congregation the salaries shown for the different years of ministry and income levels are the starting point for negotiations. Adjustments may be made based on the factors described in Section 1.1C(4) below.

(b) In making annual (or whatever period is appropriate) adjustments to salary for incumbent clergy the table is guidance. Congregations are encouraged to use it as a minimum guideline. This table does not include additional increases in compensation based on other factors such as merit, Mutual Ministry Review, the earning of an additional degree, changes in job description, etc.

(c) Congregations and clergy are urged to reach agreement on the frequency and number of salary increases beyond cost of living that will be granted during each period of service. That is, if a cleric and congregation have an agreement that covers five years of service, that agreement should specify the number and percentage of salary of any increases to be granted during the period of service and the conditions on which such increases will be granted. This allows increases to be granted or

withheld on the basis of changes in program complexity, development of new skills, increase in family size and financial responsibilities, retirement needs or other appropriate factors.

(d) All candidates for positions in the Diocese (whether coming from inside or outside of the Diocese) must be informed by congregations making searches of the Diocesan policy on negotiating agreements on initial salary and periodic salary increases.

(3) COST-OF-LIVING

The Diocesan Personnel Committee recommends for the Council's approval each year a cost-of-living adjustment that takes into account changes in the Bureau of Labor Statistics' Consumer Price Index for the Washington Standard Metropolitan Statistical Area and wage changes in both the public and private sectors. A cost of living adjustment should never be considered a raise or merit based adjustment as described above in (2b)

(4) OTHER FACTORS

While paragraphs (2) and (3) above establish criteria for minimum salaries, and the Salary Guide takes the budget of the parish into consideration, additional factors should be considered in arriving at the proper salary for an individual. Other factors to be considered in determining clergy salary include:

(a) Special Skills and Qualifications

- Skill in counseling
- Publications
- Recognition as an expert in a field
- Administrative leadership
- Fund-raising ability
- Ability to deal with media
- Interpersonal skills
- Ability as a preacher
- Ability as a teacher
- Post seminary education and/or doctoral or advanced degree work
- Average income for the parish
- Average income and cost of living for the region

(b) Character of Parish

- Number of communicants
- Economic status and composition of parish

(c) Teachers and Staff Members of Episcopal Day Schools

Teachers and staff of Episcopal Day Schools within the Diocese of Washington that are in urban or suburban locations should be compensated using as a guide the salaries of teachers and staff in the Washington area provided by the Association of Independent

Schools of Greater Washington (AISGW). Teachers and staff of Episcopal Schools within the Diocese of Washington that are in rural settings should be compensated using as a guide the salaries of teachers and staff in the Washington area provided by AISGW or the Association of Independent Maryland Schools (AIMS). The goal is to have staff and teachers compensated at or above AIMS or AISGW average salaries for comparably sized schools. For more information contact:

AISGW
Box 9956
Washington, DC 20016
(202) 625-9223

AIMS
883 Airpark Road, Suite 1
Glen Burnie, MD 21061
(301) 858-6311

(d) Job Complexity

- Size of staff
- Variety of duties to be performed
- Stress factors
- Goals and objectives of parish
- Quality of the lay leadership
- Transitional or stable membership

(e) Other Benefits such as housing allowance, continuing education, pension premiums, insurance, etc. provided by the parish.

(f) Previous Salary History

(g) Number of Years in the Job

1.1D - HOUSING

Housing may be provided if the building is owned or the rent paid by parish vestry or similar body. Or the clergy may be given housing allowance, a cash sum paid to the clergy from which they must procure housing at their own discretion. Either way, clergy are entitled to housing appropriate to their duties that is:

- conveniently located with respect to required activities
- adequately furnished with modern lighting, heating, cooking and plumbing fixtures, and refrigerator
- appropriately designed and decorated so that it is consistent with the neighborhood and nature of responsibilities
- suitably matched to family size and number of dependents
- reflective of personal needs and related circumstances

Tax implications: When clergy receive a cash allowance for housing and related costs, the vestry is required by IRS regulations to designate a portion of the total compensation to be a housing allowance. The resolution of the vestry taking this action must precede any payment. If this process is followed, the housing allowance may be excluded from gross income for Federal Income Tax purposes by the cleric.

As the proportion of salary or amount of cash allowance designated for housing has no impact on the total cost to the congregation, and as the declared use of these funds is reported by the clergy person directly to the IRS, the vestry should support the clergy person's determination of what the amount of this housing allowance shall be.

IRS regulations limit the amount of allowance to the fair market rental value of the home, whether actually rented or purchased. Clergy should realize that these amounts are debatable. The amount of allowance used must actually be expended for housing or the cleric should not exclude the amount from gross income.

This section of the Guidelines is divided into two parts. The first part applies to congregations which provide housing allowances, the second applies to congregations which provide housing. Both parts attempt to address the very diverse circumstances of the congregations in the Diocese of Washington.

(1) Housing Allowance for Parishes Providing Cash Salary: No Rectory

There are no monetary guidelines for housing offered in this section of the Guidelines. The primary reason is that housing costs vary greatly in the Diocese. What may be an adequate housing allowance for one region of the Diocese may be inadequate in another region. The variables for each parish differ depending on the location of the parish, its financial resources and the personal circumstances of the clergy being called (age, marital status, number of children, years of experience, etc.). Therefore, rather than recommending a specific amount for housing, suggestions are offered for determining a fair housing allowance. The first step in this process is to address expectations.

(NOTE: These guidelines are designed for use in initially establishing a housing allowance. The Personnel Committee recognizes that many parishes are providing a housing allowance to their rector and perhaps to other clergy. While such parishes may want to use these guidelines to assess the equity of such allowances, the Personnel Committee does not seek to disturb any existing arrangements that are working well at present).

Expectations: Whether a parish provides a rectory or not, the issue of expectations for housing and its use need to be addressed by the cleric and the calling committee or vestry. Questions which deal with expectations may include:

- (a) Is the cleric expected to use housing for more than a roof over his or her head? Will he or she be expected to use it to entertain parishioners or sponsor parish events?
- (b) Does the vestry expect the cleric to live near the church or may housing be sought further afield?
- (c) Did the cleric need to sell a house before coming to you? Will he or she want to reinvest those funds in another house?

(d) How does the housing market differ in the location the cleric is coming from and where your parish is located?

Suggestions: Determining a fair and adequate housing allowance.

(a) Ask for input from 3-4 households in the parish with similar circumstances (age, marital status, number of children) to determine what kind of housing is available in the area and desirable and what the real cost of living is in the area. Information on housing is often available from the chamber of commerce and local realtors.

(b) Be open to the preference of some clergy to own their own home, though circumstances may be such that they have no savings with which to make a down payment. Can the parish offer any kind of creative financing or low interest loan, in addition to the housing allowance? Consider an interest free or low interest loan to be paid back at a mutually agreed upon date.

(c) Investigate subsidized/moderately priced housing available in the community. While the term “subsidized housing” can be a loaded one, some subsidized and moderately priced housing in our diocese is attractive and desirable and its availability is generally not well advertised. Be aware of housing developments in your area. It is now a legal requirement in some local jurisdictions for developers to provide moderately priced housing in any new development of 50 or more homes.

(d) Use your resources. Many parishes have access to financial planners/consultants who would be willing, at no charge, to help the parish explore creative solutions.

(e) If your parish does not have the funds to provide an adequate housing allowance, consider trading this benefit for another: additional time off, a well-running car donated by the parish, higher utility payments, whatever you can think of. Be open to new possibilities and be willing to negotiate.

(f) Be aware of tax concerns. Monies currently being paid for housing are tax free. Be aware over time how these laws might change and be willing to negotiate the housing allowance so that the parish provides the cleric with the greatest possible tax advantage.

(g) If you are calling a cleric with spouse and two children: ask two or three families with two children who live in the area of the parish to meet together to discuss their own financial needs for housing, as well as issues which concern local families, e.g. school districts. This may affect the area in which the cleric family may want to live.

(h) In analyzing the housing situation, certain aspects of the cleric's ministry and the parish's demands need to be taken into account. For example, does the parish expect the cleric to entertain, or have meetings in the rectory? Is it expected that the cleric will live close to the

church? Are there specific expectations that the parish has of the cleric that will affect the housing requirements?

It is important to realize, when determining a housing allowance, that there are probably as many good solutions as there are variables. Do not be bound to arriving at a solution only one way, or the way that the parish has always done it in the past. In some instances, a combination of solutions may be the best method. Be as creative and open in your planning as is possible so that the needs of both the parish and the cleric can be satisfied in meeting housing requirements.

(2) Guidelines for Parishes Providing a Rectory

If housing is provided rent-free, the parish vestry or similar proprietary body is responsible for the full cost of maintenance, decoration and repair. Money should be budgeted regularly for this purpose. Although actual expenditures may vary greatly year by year, it is recommended that an amount equaling at least one-fiftieth (2%) of the replacement value of the housing be spent or accumulated annually in an escrow account towards time of need.

Decoration should be undertaken at intervals of three to five years. In addition to providing housing, the vestry may establish a tax-exempt allowance paid directly to the cleric for maintenance, decoration, utilities, furnishings, and household insurance.

In case of rent-paid housing, special arrangements may apply.

(The quotes noted below are taken from the Report of the Clergy Compensation Committee of the Commission on Ministry in the Episcopal Diocese of Massachusetts, 1990, page 40.)

A rectory may be a residence for the rector or may be more, serving as a meeting place for members of the parish. Rectories may provide a rector with independence by allowing the rector to live in a manner which is not otherwise affordable. A rectory can, however, become a form of control over the rector's private life, since the expenditures and changes to the rectory and the activities undertaken there are always subject to parish review.

The requirement that a rector live in a rectory can create many issues that are at once social, emotional and economic. At its simplest, the rectory is a shelter; in practice, the rectory system presents many more complicated issues in the relationship between the rector and the parish.

In a period that a rector occupies a rectory and does not own a residence, the rector is absent from the residential housing market and forfeits the appreciation and benefits of mortgage interest deductibility that the rector would have enjoyed as a homeowner. In some housing markets, when there is an increase in the value of housing, this absence can result in a substantial disadvantage to the rector. In others, where real estate values remain stable, the disadvantage may be less pronounced. The time that a rector occupies a rectory is also relevant to opportunity loss. A short tenure in a rectory might result in moderate opportunity loss. However, a rector who occupies a rectory for the principal portion of the rector's working life may be disadvantaged when the rector retires, even in a stable market with

moderate appreciation. At the end of the rector's professional career, the rector is without a place to live, and probably without the wherewithal to acquire a residence. This situation is in contrast to rectors who receive a housing allowance. Rectors who receive housing allowances can buy permanent residences, enjoy mortgage interest deductibility and appreciation and, at the end of the rector's professional career, either own a residence outright or have substantial equity, which can result in a significant tax advantage after age 65.

In short, there can be a real and significant economic disparity between rectors who live in rectories and those who do not.

(3) Equity Allowance for Clergy Living in Parish Provided Housing

For many people home ownership represents a key investment which often is a crucial factor in planning for retirement. Because many clergy are effectively excluded from having this opportunity, parishes with clergy who live in church-owned housing should consider offering an equity allowance as part of the compensation package for such clergy. A very simple way to do this is to establish a 403(b) plan for the individual and then make an annual employer contribution to the plan. Such a contribution is not taxable for the individual although it is assessable for Church Pension Fund purposes. Parishes should consider fixing their employer contribution in the range of 5% to 10% of the total compensation assessable by the Church Pension Fund. The Church Pension Fund offers 403(b) plans, as do most mutual funds and other investment services. For more information, please contact the Church Pension Fund.

Suggestions: This section offers suggestions for determining a fair and adequate arrangement for an equity allowance which would reduce the disadvantage to rectors who occupy rectories.

(a) The parish might pay the rector a supplemental allowance based on the consumer price index or an analysis of the real estate prices in the local market and pay the allowance either to the rector or to a Section 403(b) Plan.

Advantage: "The parish has discretion in establishing an allowance that conforms to local real estate or inflation values."

Advantage: "The rector has discretion over the disposition of the allowance and may invest the allowance in taxable or nontaxable plans, or may invest it in a personal residence and assume the risks of real estate investment."

Disadvantage: "This leaves the rector's compensation package somewhat uncertain: first, because movements in the CPI and real estate values are unknown at the time of calling; second, because the adoption of a formula for increases or decreases in the supplemental allowance will require expertise of the parties (with consequent time or money costs) and may result in disagreement. This is particularly true if the allowance is tied to fluctuations in real estate values, since this sort of analysis can be quite subjective. An additional complication with respect to a real estate index is how to account for declining real estate values, especially where CPI continues to increase. Since real estate values, as a practical matter, are only

relevant at the time of sale, it is possible that a rector who was paid a real estate indexed allowance during the rector's tenure who leaves a parish at a time of low values would be at a substantial advantage over rectors in similar positions who owned their own residences.”

(b) The parish and rector might establish an equity allowance or supplemental contribution to a tax sheltered (Section 403(b) Plan) annuity. The amount invested could be determined by arriving at an agreed upon percentage of the rector's salary, e.g., 25%. This would be an addition to salary, not a deduction from salary.

(c) The parish might elect to rent the rectory and give the rector most of the income generated, keeping a percentage for maintenance of the property and, if applicable, property taxes.

1.1E - UTILITIES

Whether or not the housing provided is in a rectory, vestries should either pay utility bills directly or pay an allowance to the clergy.

Utilities include:

- Gas
- Electricity
- Fuel
- Water
- Sewage disposal
- Trash disposal

1.1F - BENEFITS

Benefits or perquisites are the materials, services or protection provided either in kind, or by money designated for specific purposes, and awarded the clergy in return for the discharge of ministerial responsibilities. These benefits except for those fixed by canon law should be negotiated between clergy and vestries and defined as specifically as possible to avoid future misunderstanding.

In addition to the need for adequate compensation, there is a growing interest in flexible benefits plans. This practice, more informally known as a “cafeteria approach” to benefits has grown in recent years in the private sector. A flexible benefit plan is a benefit plan in which employees have a choice of the benefits they receive, within a specified dollar limit. Usually a core package is required (e.g., specific minimum levels of health, disability, retirement and death benefits), plus a group of elective programs from which the employee may select a set dollar amount. A primary advantage of these plans is that they can address the varying needs and life styles of an increasingly diverse workforce. With flexible benefits, a parish has more assurance that it is providing benefits that are truly appreciated and desired.

Examples of flexible benefits that are already available include group life insurance in which employees can choose to buy additional term insurance at group rates, and health insurance plans

that provide different levels of coverage that require different deductibles and premium amounts. The most frequently offered benefits in flexible plans are: education benefits, medical coverage, life insurance, dental, dependent-care coverage, 403(b), long-term disability, short-term disability, vacation time, cash for unused benefits, optical, scholarships, child care, and Individual Retirement Accounts. There are taxability issues which arise when employees make choices among flexible benefits. For instance, a plan might offer a choice between cash or being covered under an insured health plan. An employee who chooses the cash gets a taxable benefit, but the employee who chooses the health coverage is choosing a non-taxable benefit. Under current tax law, certain benefits such as medical and dental benefits are not taxable to the employee. Other benefits such as retirement plans are tax deferred. Cash received, of course, is taxable as income.

(1) CHURCH PENSION FUND

The clergy receive the protection of the Church Pension Fund assured by canon of General Convention. The Fund makes payments to clergy in the event of disability or retirement or, in event of death, to their survivors.

The full cost of the Church Pension Fund is borne by those responsible for compensation of clergy, e.g., congregation. A formula is used for annual assessment:

18% of the sum of cash salary
plus value of utilities
plus value of housing
plus contribution given towards self-employment tax

The utilities and housing are valued at actual cash paid or allowed. If housing is provided rent-free, the Church Pension Fund now defines its value for purposes of the assessment at 30% of the sum of the cash salary and the utilities.

Clergy Pension Fund benefits payable to the clergy are graduated according to the highest average income, defined as the average of the seven consecutive years affording the highest figure for salary plus utilities plus housing. Benefits are also graduated according to credited service, defined as the number of years of coverage under the Pension Fund.

(3) HEALTH INSURANCE

All clergy of the Diocese are eligible for health insurance under an approved group plan. This insurance plan will usually cover the greater portion of a hospital bill and the physicians' bills for surgery, anesthesia, laboratory and radiological services. Currently the insurance arrangement is with CareFirst BlueChoice.

Each parish vestry is charged the appropriate premium for its clergy which is paid through the Church House.

The program and its premiums are monitored by a Diocesan Insurance Committee which reports to Diocesan Council.

Request for insurance coverage must be made in writing. Application forms for the health insurance program are available at the Church House. Clergy should complete the forms and return them within 30 days of employment in the Diocese. Coverage becomes effective upon date of employment. Otherwise, an applicant will have to fill out a health questionnaire and coverage will commence one month after approval by the insurance carrier. A ten month exception on certain pre-existing conditions will be imposed for late filings. There is open enrollment period during January 1-31 of every year where clergy who have missed their 30 day window may enroll without being subjected to filling out health statements.

Benefits under the program and other information may be learned from a booklet which is available from the Business Affairs Office at Church House (202)537-6522.

(4) LIFE INSURANCE

All clergy canonically resident in the Diocese working a minimum of 20 hours per week are entitled to financial protection of a group life insurance policy. The carrier is the Church Life Insurance Company. Clergy receive double their compensation up to \$50,000 from the Church Pension Group, as long as their assessment are paid up to date. If a clergy's compensation limits them to receiving under \$50,000, they may take out an additional life insurance policy through the Diocese to make up the difference. Individual coverage is \$50,000 and is payable upon the death of the insured, to the chosen beneficiary.

Request for insurance coverage must be made in writing. An application form, available at the Diocesan Church House (202)537-6522, must be completed by the clergy. Coverage can only begin on assumption of full-time duties if notification is made to Church House. No physical examination is required at that time. Later an exam is required and Church Life Insurance

Company decides whether coverage will be allowed. The clergy normally receive an identification card and a descriptive document.

The insurance has no cash value and its coverage ceases upon departure from the Diocese. Retired clergy will be covered for \$10,000 through Diocesan funding if they are canonically resident and have life insurance coverage at the time of retirement.

Vestries may provide supplementary coverage for their clergy. However, the cost of additional insurance is taxable to the clergy and must be reported annually on a W-2 form.

(5) DISABILITY INSURANCE

Parishes should consider carrying disability insurance for all employees. It is especially important for clergy and musicians who may become incapacitated and whose services would have to be covered in their absence. Both short-term and long-term disability insurance is available through the Episcopal Church Medical Trust. Additionally, organists can be covered through a low-cost national insurance plan available through the American Guild of Organists if they are members of that organization.

(a) IRP (Income Replacement Plan):

This is a short-term disability plan offered through The Episcopal Church Medical Trust. Coverage begins on the 30th day the employee is out of work. New full-time employees have 60 days from hiring date to enroll. Applications and benefits information can be obtained through Church House upon written request to the Insurance Administrator. Premiums are billed in conjunction with the life insurance directly to the parishes from Church Life Insurance Corporation. (Note: effective January 1, 2004, all active clergy will be covered with IRP as part of their pension benefit)

(b) LTD (Long -Term Disability):

This benefit is offered by the Episcopal Church Medical Trust. Benefits start after 1 year of unemployment. New full-time employees have 60 days from their hiring date to enroll. Applications can be obtained through Church House upon written request to the Insurance Administrator. Premiums are billed the Medical Trust. Parish Administrators may contact Active Member Services at (800) 480-9967 for more information (800)223-6602.

(6) SOCIAL SECURITY/SELF-EMPLOYMENT TAX (SECA)

Parishes, missions and the diocese are urged to contribute at least half of a clergy persons' Social Security/Self Employment Tax (SECA), payable quarterly.

For tax purposes, clergy are defined as employees and the congregation should file a W-2 form with the IRS. However, unlike lay employees, the IRS requires clergy to participate in social security through the payment of Self-Employment Tax (SECA). SECA is based on net earnings, including the sum of the following:

- cash salary
- value of housing
- utilities (cash allowance or bills paid)
- parish contribution to Self-Employment Tax

This tax must be reported on Schedule SE (Computation of Self-Employment Tax) and paid by the clergy person in estimated quarterly payments using form 1040-ES. Assistance in computing the amount of Self-Employment Tax can be obtained from the local Internal Revenue Services offices.

*

The half of Social Security-Self Employment Tax (SECA) paid by a congregation does not represent the other half that the clergy person must also pay. The half of the SECA paid by a congregation is taxable and must be reported to the IRS by the clergy person as income. However, the half of the SECA paid by the congregation should not be included as part of the clergy person's cash salary when the compensation table is used as a reference.

* Social Security participation is mandatory for clergy unless a waiver, form 4361, is signed. This waiver is final and irrevocable. Since clergy who participate in Social Security are eligible for cash and Medicare benefits, it is recommended that coverage not be waived.

(7) LEAVE

(a) VACATION

Clergy with a year or more of service in the parish, separate congregation or mission, should receive a paid annual vacation of at least one month, (including five Sundays). The weeks following Christmas and Easter are often given as additional leave, not to be included as part of annual vacation. In lieu or in combination with increases of cash salary, it is also customary to grant clergy and other staff of long tenure and meritorious service additional vacation.

(b) SICK LEAVE

All clergy and vestries should negotiate time of sick leave. Although unlimited sick leave is the most common practice in the Diocese, that understanding or any other should be clearly spelled out in the letter of agreement.

(c) MATERNITY LEAVE

Each parish should have minimum guidelines established which can be negotiated. Paid time should be available for medical appointments:

½ day each month for seven months
½ day each week for eighth and ninth month
Eight weeks of paid time after delivery/adoption
Extension to twelve weeks if there are complications

Planned coverage for services and plans for returning to work should be negotiated with the vestry well before delivery.

Time for child care would be allotted as needed:

Four hours per month for routine check-ups
Emergency medical care up to eight hours per month
Emergency child care problems up to eight hours per month.

(8) LEAVE OF ABSENCE

Opportunities should be provided for clergy to be absent from their regular duties occasionally to extend their formal education, to attend meetings related to their professional interests, for writing, or for contemplation. Such leaves of absence may be of variable duration. Leaves of more than a month may be considered “sabbaticals.” See Part 1.1F(9) Sabbatical below, for guidance.

Each vestry should discuss with its clergy the appropriateness of such leave periods and the compensation arrangements that apply.

(9) SABBATICAL

The purpose of sabbaticals is for the renewal and growth of the ordained minister with the expectation that the parishes will benefit greatly as a result of the re-invigorated and refreshed clerical leader.

(a) Length of tenure before receiving a sabbatical

Following are some suggestions:

- (1) Six months in the seventh year of service
- (2) Three to five months for every three to five years of service
- (3) Two or three months per year taken over a two-year period after five or six year of service

(b) Requirement for service after a sabbatical

The diocesan policy is that a cleric owes his or her parish at least one year of service following a sabbatical.

(c) Planning for funding

There should be a budget line every year and discussion at least in the vestry so that the arrival of the actual sabbatical will not be a surprise. Unfortunately, the diocese has no funds to offer at this time.

(d) Changes during rector's absence

Careful consideration should be given in advance to the question of significant changes in direction in a parish's life and ministry during the absence of a rector.

(e) Reference Material

The Personnel Committee recommends careful study of the Alban Institute publication, "Sabbatical Planning for Clergy and Congregations" by A. Richard Bullock.

(f) Interim Clergy

In the unique ministry of interim clergy, there is often no opportunity to accrue sufficient time of service towards a sabbatical. It is therefore recommended that congregations make financial provisions within the contracts of interim clergy for a period of one month's sabbatical time at the conclusion of the interim period. This may be adjusted proportionately for interim periods of unusual length.

(10) CHILD CARE

Vestries and all diocesan related institutions may negotiate child care provisions and/or allowances in special circumstances.

1.1G - REIMBURSED EXPENSES DEFINED

Clergy may be required to incur certain expenses necessary for the performance of professional duties. The following are such expenses for which clergy should be reimbursed at actual cost or according to standard scales and for which clergy should make written accounting to the vestry.

(1) AUTOMOBILE USE

Clergy required to use a personal car on church business should be reimbursed for such use at the permissible rates set by the IRS. In 2003, the IRS allowable mileage rate is:

First 15,000 miles in a year - 36 cents per mile

Whether clergy are provided with a fixed travel allowance or are reimbursed for actual expenses, they must report this as income for federal tax purposes and deduct their travel costs as business expense on form 2106, unless not applicable to principal employment.

Parking fees and highway toll charges incidental to such use should be reimbursed. Mileage driven, fees and tolls incurred for personal reasons should be excluded.

(2) TELEPHONE

The cost of telephone and related services (e.g. answering machine, facsimile machine) used for church-related purposes should be reimbursed as billed. Basic telephone service in the clergy residence (even if the residence is not a rectory), including directory listing in the name of the clergy, is standard for the clergy of a parish or mission. Bills for this service should be reimbursed, reduced by the amount that represents any use of the service for personal reasons.

(3) OFFICE EXPENSES

Stationery, postage stamps, reproduction and similar costs usual to the conduct of a clergy office, incurred by the clergy in performance of duties, should be reimbursed in full if not included in the parish budget.

(4) TRAVEL

Minimum common carrier transportation costs – bus, train or airplane – shall be repaid to the clergy whose duties require them to travel when the use of their own automobiles would be unsuitable or impractical. In the event of extended travel, clergy should also be reimbursed for the actual cost of meals and lodging and for other necessary professional expenses, such as registration fees, entailed in connection with such travel. The concurrence of the vestry should be obtained for such a trip and expense items to be reimbursed should be identified by agreement in advance.

(5) OTHER

Other expenses incurred in connection with duties and responsibilities of the clergy may be reimbursed pursuant to advance understanding between clergy and the vestry.

1.1H - UNEMPLOYMENT COMPENSATION

Religious institutions may elect to participate or NOT to participate in unemployment compensation. The law does state that employees must be notified if the parish is not participating in unemployment compensation. Each employee's contract should indicate if their parish does not participate and a written statement should be posted.

1.1K - CLERGY HONORARIA

Although parishes may have their own tradition and policy regarding clergy honoraria, many have not published any information in this area. In order to avoid misunderstandings and to facilitate the use of honoraria in specific instances, parishes should establish a written guide/scale for reference. Some points to be considered are:

- What type of service and what degree of preparation by clergy is required?
 - Weddings, funerals,* baptisms.
 - Counseling, rehearsals, planning, etc.

- What is the honoraria for?
 - Compensation (If so, don't forget accountability for taxes).
 - Donation to the ministry of the church.
 - Do you wish to provide an explanation of honoraria to the recipient of the service(s)?
In print?

- If honoraria is for compensation, who performs the service and what is his/her economic needs?
 - Low income clergy, part time, rural, retired clergy, etc.

- How much should the honoraria be?
 - Completely left up to the donor/payer, recommended range, specific amount.
 - How and when is this communicated?

- Differentiate between member and non-member?
 - Also, active and "non-active" members; relatives of members; former members.

- Local custom.
 - What has been the practice of the particular parish?
 - Who to involve in setting or revising a parish policy, e.g. vestry, special committee, clergy?

* Often funeral homes will include a clergy fee in its bill to the family.

WEDDINGS AND FUNERALS

The handling of compensation for weddings and funerals varies from parish to parish. Some clergy take a fee for all services. Others take a fee but put all income from members and members' families in their discretionary accounts, keeping only fees from non-members. Others take no fee at all.

If fees are collected (either for the clergy or a discretionary account), the following are recommended:

- Funerals - \$250 for members and non members
- Weddings - \$150 to \$300 for members
- \$300 to \$500 for non members

The wedding fee includes premarital preparation by the clergy person. If more than usual time is spent in premarital preparation or in wedding plans, additional fees may be charged.

PART 1.2 - COMPENSATION, BENEFITS AND CONDITIONS OF EMPLOYMENT FOR CLERGY ENGAGED IN PART-TIME MINISTRY

1.2A - INTRODUCTION

(1) PURPOSE

(a) To provide guidelines for the use of parishes, separate congregations and missions in establishing salaries, benefits and conditions of employment for clergy engaged in part-time ministry.

(b) To provide guidelines for the use of clergy considering part-time ministry positions.

(c) To outline the personnel matters that should be included in agreements negotiated between parishes, separate congregations and missions and part-time clergy.

(2) DEFINITIONS

Part-time clergy - Ordained priests and deacons who serve in a parish, separate congregation or mission on a less than full time basis. The line between part-time and full-time is not exact, i.e. 35 hours per week may be considered part-time, but since some benefits must be provided at any level of employment, others become entitlements at 20 hours and others are always negotiable, there is little need for a precise definition.

The definitions included in Part 1.1 apply in this Part.

(3) EXCLUSIONS

This guide does not cover supply clergy. Use the Guide for the Compensation of Supply Clergy (Part 1.3).

(4) REFERENCES

The references cited in Part 1.1A(3) and all the provisions of Part 1.1 apply to Part 1.2 unless specifically modified or excluded by the provisions of part 1.2.

(5) SPECIAL FACTORS BEARING UPON THE COMPENSATION AND BENEFITS OF CLERGY ENGAGED IN PART-TIME MINISTRY

There are many different reasons a parish, separate congregation or mission (hereafter parish) decides to seek part-time help. There are also different characteristics of clerics seeking part-time ministry. This guide does not attempt to describe THE way an agreement can be structured, but

attempts to set some of the parameters within which parishes and clerics should negotiate agreements. This puts a heavy responsibility on both parishes in

preparing vacancy sharing information and clerics in inquiring about opportunities to be completely open about expectations.

(6) FIRST STEPS FOR PARISHES CONSIDERING EMPLOYMENT OF CLERGY FOR PART-TIME MINISTRY

There are three basic steps to be taken:

1. Determine the job or jobs that need to be done and whether permanent or time limited;
2. Determine how much time is required to perform that job or those jobs; and,
3. Determine how much money is available to pay all the costs associated with employing someone to perform the job or jobs. Part 1.2 of this guide describes the different costs that a parish must consider and gives some guidance on arriving at dollar figures.

(7) FIRST STEPS FOR CLERGY CONSIDERING PART-TIME MINISTRY POSITIONS

There are two basic steps a cleric should take:

1. Determine acceptable conditions of employment, e.g. kinds of jobs or duties which match the cleric's training, experience and interests, the number of hours a week or month that can be devoted to a part-time position and whether or not a time limited position can be accepted.
2. Determine an acceptable range of compensation, benefits and other financial considerations. (Part 1.2 of this guide should be helpful to clerics in coming up with an acceptable level.)

(8) VACANCY SHARING INFORMATION

When a parish starts publicizing its need for part-time help the information that is disseminated should include at least:

A full description of the job or jobs to be done;

A statement of the number of hours a week or month required and whether the position is permanent or time limited;

The total amount of money available for compensation, benefits and other costs; and,

A statement that the way the money is broken down between compensation, benefits and other costs is negotiable, e.g. that salary can be higher for a cleric not requiring housing than for a cleric requiring housing, or that if a cleric does not require health insurance, that amount of money can be devoted to housing, salary or continuing education.

1.2B - SALARY

In determining the amount of money devoted to salary that the parish needs to support a part-time clergy position the Clergy Salary Table (Part 1.1B of these Guides) is a useful starting point. The parish should assume a certain level of experience (a level that would appropriate to the job or jobs to be done), use the column on the table appropriate for a parish with its income, adjusting if the position is not the rector (see Part 1.1C(1)) and multiply the figure arrived at by the percentage of time projected for the job or jobs. For example, if the position is to be half time assistant in a parish with income of \$250,000 and is expected to do everything the rector does, requiring at least five years of post ordination experience, the salary figure would be 50% of the five year experience cell of column C.

1.2D - HOUSING

(1) If the parish plans to provide housing and will not consider paying a housing allowance, it should so state, unequivocally, when publicizing the vacancy. If the parish is willing to provide an equity allowance in addition to providing housing Part 1.1D(3) provides guidance. Such a willingness on the part of the parish, and the amount of money available, should be mentioned in the vacancy information.

(2) If the parish is willing to provide a housing allowance it should refer to Part 1.1D(1) in determining the dollar amount appropriate for its geographic location. The parish may pro rate the allowance in the same manner as the salary.

1.2E - UTILITIES

The parish should determine just how much it is willing to pay for utilities and include that figure in its total dollar figure.

1.2F - BENEFITS

(1) CHURCH PENSION FUND

This is not a negotiable item. The parish can calculate a dollar figure through application of the provisions of Part 1.1F(1).

(2) HEALTH INSURANCE

All part-time clergy working 20 or more hours a week (i.e. half time or more) are entitled to health insurance at the expense of the parish. In projecting costs parishes should use, as a minimum, the cost for an individual policy. The exact dollar figure should be available in each parish, if not, it is available from the Business Affairs Office in Church House.

(3) GROUP LIFE INSURANCE

Not applicable. Only clergy who work a minimum of 20 hours per week are eligible under the existing Church Life Insurance Company policy.

(4) SOCIAL SECURITY

Parishes are encouraged to contribute at least half of the Self Employment Tax. Refer to Part 1.1F(5) to determine a dollar amount for planning purposes.

(5) LEAVE

The provisions of Part 1.1F(7) should be followed.

1.2G - REIMBURSED EXPENSES

The provisions of Part 1.1G apply. The parish should make a calculation based on past experience.

1.2H - UNEMPLOYMENT COMPENSATION

The provisions of Part 1.1H apply.

1.2K - OTHER CONSIDERATIONS

(1) CONTINUING EDUCATION

The provisions of Part 1.4 apply. If the position is going to last more than a few months dollars and time should be made available.

(2) EVALUATION

Part-time clergy are fully deserving of feedback on their performance. The agreement negotiated for the call should include provision for such feedback.

PART 1.3 COMPENSATION FOR SUPPLY CLERGY

1.3A - INTRODUCTION

(1) PURPOSE

To provide standards for the proper compensation of Episcopal clergy who serve as substitutes or guests in leading or assisting at worship services.

(2) APPLICABILITY

Rectors, vestry and other compensation authorities and clerics serving as supply or guest clergy should use this document in negotiating fees. In preparing the Guide the Diocesan Personnel Committee recognizes that there may be situations where parishes may not be financially able to meet the standards set by this guide. Such parishes, and the clergy they seek for supply or guest service, should feel free to negotiate a lower fee or no fee.

(3) EXCLUSIONS

This guide does not cover part-time or full time temporary situations. See Part 1.2, Compensation, Benefits and Conditions of Employment for Clergy engaged in Part-Time Ministry, for such situations.

(4) DEFINITIONS

Supply Clergy - Ordained clerics hired by a parish, separate congregation or mission to perform or assist in those duties associated with worship services normally carried out by a rector or vicar, on a one-time or short-term temporary basis.

Compensation - the fee paid for the specific services provided.

Travel expenses - Transportation, room and board costs associated with the performance of supply clergy services.

1.3B - COMPENSATION

WORK PERFORMED

Sunday Services:

	<u>1 service</u>	<u>2 services</u>	<u>3 services</u>
no sermon	\$150	\$225	\$300
with sermon	\$250	\$375	\$500

Weekday Services: \$100

Assisting: \$ 50 \$ 75 \$100

It is always appropriate to discuss the fee at the time the invitation to serve is extended. Please take in to consideration the time needed for preparation, travel, and in performance of the service you have requested. For further guidance about fees for other kinds of services such as guest preaching, calling on parishioners, parish consultations, pastoral counseling, weddings, and funerals, refer to sections Part 1.2B Compensation and Part 1.9A Honoraria.

1.3G - REIMBURSED EXPENSES

Compensating authorities should keep in mind that the expenses that supply clergy incur are out of pocket costs and even if the parish, separate congregation or mission cannot pay a fee it should fully reimburse all such expenses.

(1) Transportation

(a) If by privately owned automobile, reimbursement should be at the IRS rate, currently 36 cents per mile.

(b) If by public carrier, costs to be reimbursed should be agreed to prior to the service being provided.

(2) Room and Board

All costs to be reimbursed should be agreed to prior to the service being provided.

PART 1.4 CONTINUING EDUCATION

1.4A - INTRODUCTION

The Bishop of Washington strongly urges clergy to engage in continuing education efforts on an ongoing basis. A commitment to one's continuing education is a commitment toward increasing one's excellence in ministry. Continuing education may be course work toward an advanced degree, or non-credit work. It may include participation in seminars, workshops, conferences and experiential opportunities which support the exercise of ministry and spiritual growth. Some continuing education efforts require funding and time away from the ministry site. Other forms of continuing education may be obtained through professional reading and professional dialogue on a local basis.

1.4B - FINANCIAL RESOURCES AND TIME ALLOWANCES

Financial resources for continuing education should be a line item in the parish or organizational budget. The range of funds available will vary, but should realistically meet required costs of programs such as the annual clergy conference and registration/tuition/travel costs for one or more continuing education experiences a year. A minimum of \$1000/clergy person/year is suggested for this purpose. Time allowances for continuing education and spiritual refreshment away from the ministry site should be at least two and one-half weeks annually above and beyond annual vacation and leave.

Clerics should be given the opportunity to carry over time and funds to the next year when circumstances make it impossible to take advantage of continuing education opportunities in a given year. Such a "carry over" policy facilitates the possibility of in-depth study. Negotiation between the cleric and vestry will determine details regarding the maximum carry over time allowed.

The Diocese has a limited amount of funding available through the Angus Dun Fund. This fund was endowed through a capital drive and was named for the Fourth Bishop of Washington to support the continuing education of clergy in this diocese. The availability of the Fund illustrates the historical concern of Bishops for clergy continuing education. For further information contact the Chair of the Angus Dun Fund, presently the Rev. Karla Woggon., Rector, St. Andrew's Church in College Park (301-864-8880) or the office of Ministry and Resources Development (202) 537-6532.

1.4C - DETERMINING NEEDS AND TIME REQUIREMENTS

Short-range continuing education as well as long-range continuing education needs and interests are often made known through the annual evaluation process with the vestry, one's superior, or in consultation with one's spiritual director. It is the responsibility of each cleric to seek out the best method of identifying his or her needs for continued growth, and to explore ways and means to do so. Consultation with the Bishop is advised when considering substantial investments of time and resources.

For example, some clerics require training in specific task areas, such as homiletics, pastoral counseling, parish administration or stewardship. Others may want an opportunity to travel and study, attend a retreat, or do writing and research. There is no one type of continuing education. Continuing education, however, is professionally necessary for all clergy. Primary factors in determining continuing education

needs are: (1) evaluation of current ministry strengths and weaknesses and (2) determination of future goals for ministry.

“The Guide for Continuing Growth,” published by the Academy of Parish Clergy, is available from the Academy of Parish Clergy, 13500 Shaker Boulevard, Suite 601, Cleveland OH 44120 (Tel: 216-295-2006). It includes a methodology for determining clergy continuing education needs.

Sabbaticals are a specific type of continuing education which require extensive planning and prior budgeting. See 1.1F(9) for guidelines and considerations for sabbaticals. In lieu of formal sabbaticals, some clergy may consider planning intensive continuing education experiences approximately every four to five years, lasting from six to twelve weeks.

1.4D - RESOURCES AVAILABLE (non-financial)

The Washington metropolitan area offers many and varied opportunities for continuing education, as do other major cities. Announcements of conferences, seminars and workshops are found in professional clergy literature and are posted at seminaries, cathedrals, churches, universities and specialized centers such as the College of Preachers, the Alban Institute, Shalem and the Trinity Institute in New York.

Libraries and research centers abound, with print and non-print media for research support. Also, international opportunities for research, travel and exchanges with other clergy are available.

1.4E - NATIONAL CHURCH OFFICE CONTINUING EDUCATION PLAN

The Diocese of Washington is participating in a National Church Office plan to strengthen continuing education throughout all of the dioceses. When fully implemented, this program will involve both clergy and lay professional employees in the parishes. During the first year of this program, participation is voluntary and only for clergy. The program is based upon the existing vision statement and goals of the Diocese. Continuing Education objectives have been developed for each Diocesan Goal:

Goal 1: Deepen our bond with Christ through worship, studying the Bible, nurturing the spiritual life, And sharing our faith;

Objective 1: Enhance clergy conferences to incorporate scripture study, faith development, and small group processes

Objective 2: Continue support and training for colleague group facilitators

Objective 3: Utilize more effective courses at the College of Preachers

Goal 2: Become a community of brothers and sisters in Christ where all are accepted and none are despised;

Objective 1: Expand development of diversity training

Objective 2: Engage all clergy in anti racism training before the end of the triennium

Objective 3: Explore our diversity through on going programs of sharing

Goal 3: Work together as laity and clergy in partnership to do God's work in the world;

Objective 1: Develop leadership capabilities for vestries and clergy

Objective 2: Identify and raise up clergy and lay leaders for "train the trainer" programs

Objective 3: Create a cadre of lay and clergy leaders for Parochial consultations

Goal 4: Strive for justice and compassion for all the people in our communities and in society at large.

Objective 1: Create programs of continuing education which focus on emerging social issues

Objective 2: Explore issues related to addiction and recovery

Objective 3: Develop education opportunities which focus on concerns and issues related to children and child development

Within this framework, the continuing education program focus on three areas:

Ecclesiastical

Professional

Personal

When considering a program, course, or seminar, participants in the continuing education program should determine which of the above areas are being enhanced and which of the above continuing objectives are being supported. Questions that should be asked for each proposed program, course or seminar are:

- * How does this enhance the life of the church? (Ecclesiastical)
- * What new skills or improvement of skills can be gained from this training? (Professional)
- * How will this study enhance your personal journey in faith? (Personal).

If one or more of these questions can be answered in specific terms, the proposed training should qualify for the Diocesan Continuing Education Program.

The generally accepted standard for continuing education units (CEU) is that one contact hour equals one CEU. In terms of clergy conference days (9am to 4pm), this standard would result in 6 CEUs for a whole day and 3 CEUs for half a day. During the development phase of the continuing education program, 24 CEUs annually is considered the standard. When fully implemented, the standard will be 36 CEUs annually. As an example the four clergy days that were planned for 2001 would provide 21

CEUs for those attending all the days. Thus in order to reach the standard of 24 CEUs annually, those participating in the program need only one additional training course that would provide 3 CEUs in order to meet the standards of the Diocese's new continuing education program.

PART 1.5 CHURCHES WITH SCHOOLS OR OTHER MISSION ORGANIZATIONS

1.5A Episcopal Day schools or other financially independent church-related mission organizations associated with parishes often place significant time demands and expectations on the clergy and other church employees who work for those parishes. In these cases it is appropriate for the school or mission organization to share the compensation of the clergy person or other church employee with the parish in proportion to the amount of time spent in each place. For example, if a clergy person serving a parish with a school spends an average of 15% of his or her time with the school (doing counseling, teaching, leading chapel, helping with administration, or serving on the board, etc.), then it is appropriate for the school to pay 15% of that person's total compensation package. See also 1.1C(4)(C) for other information.

1.5B It is appropriate that children of clergy or other church employees serving parishes with day schools be offered scholarships to attend those day schools. The source (e.g. the school or church's budget, school financial aid program, etc.) And amount of scholarship funds should be negotiated between the Vestry and School Board before the calling of the clergy person or the hiring of staff and clearly defined in that person's contract or letter of agreement.

PART 1.6 ESTABLISHING POSITION DESCRIPTIONS - CLERGY

A position description is a statement of the major duties, responsibilities, and supervisory relationships of a given position. The description of each position should be reviewed on an annual basis and revised as necessary. The description should include information about the job that is significant to the duties of the position.

For clergy this may include general areas of ministry as well as items that are specific to the parish. Clergy who are given charge of youth ministry, education, or other specific areas of responsibility that involve special expertise and significant demands of time should have these areas and expectations regarding them clearly delineated. As participation in the ministry of the diocesan is an expectation of all clergy, this, along with expectations for other ministerial service in the broader community, should be included in the position description. For clergy in supervisory positions, the position description need not include a detailed discussion of the work performed by subordinate employees. It is important, however, that there be consistency between a supervisor's and subordinate's position descriptions concerning supervision given and received.

The position description should be in agreement with WECA and Diocesan Guidelines and related canons. It should be attached to the clergy person's letter of agreement or contract and included in the parish's personnel policy manual.

PART 1.7 - MUTUAL RECTOR/VESTRY EVALUATION

1.7A - INTRODUCTION

The Diocese supports the concept of mutual rector/vestry evaluations. These kinds of evaluations reflect the truth that ministry is a shared responsibility, not solely the burden of either the vestry or the cleric. The model proposed in this section is designed to empower the ministry of the cleric and the vestry members and is designed to de-personalize the effect of the evaluation. The idea of the process is to actively reflect on the ministry of the congregation in order to serve Christ more effectively in the world and suggests that these be conducted on an annual basis.

The evaluation process recommended in this section does not apply to either mission vicars or assistant clergy. Evaluation of mission vicars performance involves the mission chapel committee and the Bishop. Evaluation of assistant clergy is the responsibility of the parish rector and may differ from parish to parish.

1.7B - A Model for Mutual Rector/Vestry Evaluation

The intent of this model is to help a rector and vestry evaluate areas of the total life and ministry of the parish and, in the process, to evaluate the effectiveness of those persons or groups who give leadership to these areas.

The areas of parish life to be examined can be those defined by established parish commissions or committees, though they might better be chosen and defined by more general categories such as SWEEP (Service, Worship, Education, Evangelism, and Pastoral care) or even by diocesan programs or goals such as stewardship, mission, evangelism.

The areas chosen should be broad enough to encompass the work of both the rector (and assisting clergy) and members of the vestry, as the leadership of the parish, though all of these persons will not necessarily be involved with each area. It is better to evaluate one or two areas carefully than to attempt to cover all areas. The process is simple enough that it can be done a couple of times a year using different areas each time.

It is important that the evaluation process be initiated jointly by the rector and the wardens (or vestry executive committee, etc.).

Procedure:

(1) Rector and wardens decide on what should be proposed to the vestry. The proposal should include the following.

- (a) A way to identify the areas to be considered.

(b) A schedule for the evaluation. This should include 1 or 2 weeks for each person to do their own thinking and writing, a week or so for the collators to do their work and distribute it in written form to the vestry and clergy, and a date for an evaluation session.

(Allow at least an hour for each area chosen.) The whole process should be completed within a month.

(c) Who will do the collating. Use at least two people. These may be chosen from outside the vestry. They should be people who will keep their work confidential.

(d) Choose a person who is not a member of the vestry, nor one of the clergy of the parish, to lead the evaluation session.

(2) Present the proposal to the vestry for modification and/or approval. Make certain that everyone understands what the selected areas cover and what each participant is expected to do.

(3) Individual reflection and writing by members of the vestry and clergy. This step is important to the honesty and comprehensiveness of the process and should not be shortcut. Descriptive words and phrases are adequate for this work. Participants could be encouraged to talk with other members of the parish while they reflect on the areas. Statements of observable behavior (“The rector always preaches on the Gospel for the Sunday.”) are more helpful than generalizations (“I like the rector's sermons”). For each area:

(a) List everything going on in the parish right now (or within the last year) which falls within the area. If you have more than four items for the area, choose two or three which seem most important to you.

(b) For each item, list the role(s) taken by the clergy, other staff, lay leaders, and the vestry.

(c) For each item list the strengths of the current situation.

(d) For each item, list the weaknesses of dissatisfactions with the current situation.

(e) For the area, what additional information do you need to more accurately assess the situation? What questions do you still have, or want to ask?

(See the attached sample and illustrative worksheet.)

(4) Collation. The collators should condense the answers as much as possible. The number of people reporting the same things should be indicated. When collators are uncertain about whether items reported are the same, it would be better if they simply wrote out the information as submitted. The primary role of the collators is to “depersonalize” the information and to distribute legible copies of their work to all concerned at least a day or two in advance of the evaluation meeting.

(5) Discussion by all parties. Allow at least an hour for each area. To avoid the pressure of regular vestry business, this session could be a special meeting of the vestry. An "outside" discussion leader or

consultant will make it possible for all the vestry and clergy to participate freely in the discussion. The task of the leader is to:

- (a) Keep the discussion on target.
- (b) Help the vestry identify significant areas of strength or weakness, and avoid getting bogged down in “favorite subjects” or “pet peeves.”
- (c) Keep everyone realistic about roles and reasonable expectations.
- (d) Make certain that strengths get at least as much attention as weaknesses.
- (e) Help the group summarize in terms of next steps or new goals. This can include goals for the ministry and professional development of clergy and other staff persons.

PART 1.9 - OTHER

1.9A - HONORARIA

This Section offers guidelines for honoraria for speakers participating in a Sunday Forum environment, a Seasonal Series or on other occasions.

(1) Honorarium range:

\$50 is an absolute minimum amount to offer a speaker. A range of from \$50 to \$300 for one presentation is suggested. For special events such as a Lenten Series, an honorarium should be in the upper ranges. Significance of the presentation, amount of preparation required, and number of people attending are factors to consider for making a decision.

Specifying the amount of the honorarium at the time of inviting the speaker is helpful. This gives the speaker additional data for making the decision to accept or turn down the invitation.

If the honorarium is in the lower ranges, speakers are often attracted by offers of support: publishing and distributing articles, giving the person a write-up in the newsletter, distributing literature, or placing an ad in the bulletin.

(2) Inviting a presenter for a day-long retreat:

Factors to consider:

- (a) The impact of the presentation
- (b) The amount of time required to prepare and to present
- (c) The expertise of the person presenting

Guidelines:

- \$250 per day minimum plus expenses
- \$500 per day plus expenses is standard
- \$1000 per day plus expenses for a professional consultant

1.9B - ADVOCACY FOR CLERGY DURING COMPENSATION/BENEFIT NEGOTIATION

At the time of determining the annual budget in congregations, clergy often find it difficult to negotiate for an adjustment in their compensation and benefits. Negotiation is not a skill which everyone possesses. In response to this reality, the Personnel Committee proposes that clergy ask an advocate to represent his or her needs and desires to the vestry or budget committee. This section of the Guidelines proposes a method for finding and making use of an advocate.

- (1) Let the vestry and budget committee know well in advance that you will be asking someone to represent you at the budget meeting.

(2) When deciding on an advocate, choose someone who cares about you within the parish community, but not the Treasurer (the Treasurer would be put in an untenable position as your advocate). The advocate does not have to be a member of the parish, but needs to be someone with credibility in the community. The advocate should have an understanding of the covenant between the cleric and the parish and also have a sense of advocacy as a ministry that serves both the cleric and the parish. Write or call this person and outline what you are asking him or her to do. For example, you would like an advocate:

- (a) To represent you and your needs to the vestry or budget committee;
- (b) To discuss with you what your hopes are for the next year regarding your package;
- (c) To meet with you one or two times before the budget meeting;
- (d) To be an advocate for one or two years.

(3) Meet with the person you've chosen to be your advocate at least one week before the budget committee meets.

- (a) Give the person a sense of the purpose of being your advocate
 - To have sense of this ministry as a way of caring for the parish cleric who comes to the parish as servant
 - To understand that vestry and cleric have entered into a mutual covenant of care giving. As the cleric cares for the people, the people must care for the cleric. This is important for the parish as well as for the cleric
 - To speak for the cleric when he or she may not be in a position to speak for himself or herself
- (b) Use the Diocesan Guidelines as focus for the meeting and go through them carefully
- (c) Note all the categories of the covenant between the cleric and the vestry
- (d) Note that it is reasonable for parish to support these categories
- (e) When you come to the financial section, note that the recommended amounts are minimums, not maximums
- (f) Ask if the advocate can accept the principles of the categories
- (g) Have an annual meeting with the advocate to review your needs and what you hope for
- (h) Assure the person that you are depending on him or her to represent your needs
- (i) Don't be afraid to articulate your needs

1.9C - GUIDELINES FOR PARISH, CLERIC AND FAMILY DURING MARITAL STRESS, CRISES AND DIVORCE IN CLERGY FAMILIES

The establishment, blessing and nurture of Christian marriage and Christian family life is a primary task of the church. Christian marriage, at best, provides a secure place for the wholesome expression of human sexual communication as well as for reproduction. Through the faithful commitment of one person to another, God addresses their loneliness and blesses them with the gift of companionship. Clergy separation and divorce do occur. They are realities usually accompanied by confusion and hurt. They are among life's most threatening and painful experiences. These

guidelines are designed to be useful to rectors and families, vestries and congregations as they develop ways of dealing with marital problems of clergy.

In the process of working with the problems that have become apparent in a marriage, the various parties affected have responsibilities which they must accept. Each should respect the confidentiality of the situation. It should be recognized by all parties, if divorce ensues, that this may affect the life of the congregation for some time to come.

(1) Clergy Responsibility:

- (a) Recognizing serious problems developing within the marriage;
- (b) Discussing problems with spouse and children;
- (c) Discussing the situation with an appropriate and trusted third party;
- (d) Seeking professional counseling for self and family;
- (e) Recognizing the potential impact upon the congregation in such areas as:
 - (1) Management of the church's day to day affairs
 - (2) Counseling for parishioners
 - (3) Visiting parishioners
 - (4) Emotional response of the congregation
- (f) Counseling with the bishop for guidance on what approaches to use for the problem;
- (g) Discussing with the Senior Warden, as appropriate, when problems impact on the parish.

(2) Spouse's Responsibility:

- (a) Recognizing serious problems developing within the marriage;
- (b) Discussing problems with spouse and children;
- (c) Discussing the situation with an appropriate and trusted third party;
- (d) Seeking professional counseling with spouse.

(3) Vestry/Senior Warden Responsibility

- (a) Approaching the clergy when problems impact upon the congregation;
- (b) Deciding what role vestry should take;
- (c) Suggesting counseling for clergy and family if problems appear to be escalating;
- (d) Requesting assistance from bishop if unable to help to resolve the problem;
- (e) Setting limits as to when the parish will no longer allow problems to disrupt the parish and the congregation;
- (f) Deciding what continuing financial support is available to the clergy and family should divorce ensue.

(4) Bishop's Responsibility

- (a) Setting up a protocol as to when the Bishop becomes involved;

- (b) Being available to clergy and family;
- (c) Having within the diocese counseling resources available to clergy and families;
- (d) Developing a diocesan policy on divorce and remarriage of clergy.

1.9D - RETIREMENT SUGGESTIONS - These suggestions were issued in June 1989, updated in 1997, and included as follows:

Introduction

This section of the Guidelines is designed to help clergy, who are thinking of retiring, work with some of the many issues related to a major life change. It purposefully includes more questions than answers since everyone's situation is different. Everyone needs to think about his or her own situation and work out his or her own answers. Some resources that can help are also included in this section. Many persons will have questions about the Church Pension Fund and Social Security. Current, accurate information can only come from the people and offices that administer these programs.

If I am thinking about retiring, who else is involved in making the decision?

Any individual whose life is going to be affected by your retirement deserves to be involved in making that decision. Every question asked in this pamphlet needs to be asked of spouse, children, parents and others who may be moved, have their standards of living changed or be separated from job or friends. Involve them in your thoughts, your plans, your scheduling; take them along if you attend a pre-retirement training program; have them with you when you make the announcement to the parish.

Is there a pre-retirement training/planning program available?

The Diocese from time to time may provide training/planning programs for clergy and spouses (and others affected by retirement). Watch for announcements of these events.

Am I going to have sufficient income to maintain my present, or a slightly reduced, standard of living?

While everyone has a different set of circumstances, some financial planners state that if your retirement income is 60% of your pre-retirement income you probably can maintain the same standard of living. There are significant differences in expenses after retirement. Transportation, entertainment, clothing (you will be recycling your "work" clothes for years and won't dress up nearly as often), subscriptions, memberships and books and material costs will drop or even disappear. Travel expenses may go up, so may the costs of what used to be a spare time hobby which becomes a weekly or daily avocation. In any event, make a very careful inventory of your assets and liabilities and a serious study of your expected regular expenses. Then compare your expenses with your projected income. It is important that others be involved in this process. Spouses and others may very well know more about expenses than you do, particularly if they took care of the household accounts). If your projected retirement income doesn't match up to at least 60% of your pre-retirement income, or at least match your expected expenses, how are you going to make up, or adjust to, the difference? Is part time work as a priest going to be possible? Can you start a new line of work? Can you significantly cut some expenses? In calculating expenses some things require the special attention of clergy. Among these are:

Housing costs - Many of you have lived in rectories and may just not be familiar with what it costs to purchase or rent or maintain a residence. If you and your dependents have any uncertainties about this, talk with members of your parish, or your families, who have more experience. Remember, retirement is a big decision, one of the biggest changes in your life. Don't make decisions about it in a vacuum. Ask as many questions as you did when you answered your call to the priesthood.

Taxes - Most of you have been paying your taxes on an estimated basis, so shouldn't have any trouble doing the same when retired. But, do look carefully at your tax liability. Look carefully at any tax free income you have had. Talk with the Church Pension office about the tax status of your pension. Some of it may be tax free. Also, carefully check your status on state income taxes. Every state is different. Don't wait until you are filing your return the year after you retire to find out that you are going to owe several hundred dollars that you had not planned on, or that you need special forms or documents to support your return. Call the IRS or your state or DC tax office early.

Have I examined my insurance programs? Not just life insurance, but also auto, house and contents, personal liability and health for myself and family?

Life Insurance - Examine this closely. What do you really need for the protection of your dependents? Almost all newly retired clergy are now provided with \$25,000 life insurance funded by the Church Pension Fund. Generally speaking, any whole life and other "permanent" policies should be paid up before you retire. Commercial term policies are usually prohibitively expensive for people of retirement age. Discuss this with someone you trust and respect for their financial acumen if you are not sure what you should do. If you have questions about the \$25,000 policy provided by the Pension Fund, call the Business Affairs Office at 202-567-6522.

Automobile Insurance - Costs vary by locality, type and age of car, age of drivers, driving records, etc. Only a knowledgeable broker or agent (or perhaps a Consumer Reports study) can give you the necessary information for your particular situation. Remember, Washington DC is not just one locality. If you are moving from one area to another it probably will make a difference.

House and contents - If you have been living in a rectory you did not need insurance on the structure. You may now. Make inquiries about different policies from different companies (as you would on auto insurance). Costs in this area, depending on house value, seem to range from \$350 to \$600 per year for full replacement coverage on the structure and for \$50,000 of contents. Such policies also include personal liability insurance covering a variety of situations - not related to a business or an automobile.

Health and hospitalization - If when you retire from parish or diocesan employment, you are a participant in the diocesan health plan and are canonically resident in the Diocese of Washington, you may continue your coverage in the diocesan health plan. There are also provisions for spouses and other dependents, if any. Contact the Business Affairs Office (202-537-6522) for further information. The entire Medicare program is currently under review and is subject to significant changes. Future editions of these guidelines will address any changes. Until then, it is important that persons thinking of retiring consult the Business Affairs Office to learn of changes in the program.

At age 65, if you are a Social Security recipient, you become eligible for Medicare. Some of Medicare is free, some is not and there are some options. Look carefully at the options. Medicare Part B is one that many feel well worth the cost. Combined with a fairly comprehensive commercial or institutional plan Medicare has proved adequate for the great majority of retired persons. Just make sure that any special problems or needs of yours or your dependents are covered by whatever plan or combination of plans you will have. And, make sure that you estimate the costs accurately. Do not underestimate. Health insurance costs have been going up faster than the cost of living for the last few years. Also, if you are going to start paying all or part of the costs for your health insurance, remember that this a new cost for most of you. Be sure to include it in your calculation of expenses – near the top in terms of importance.

Some of you may be covered under the Church Pension Fund Major Medical Supplement to Medicare Plan. This program is free to those 65 and over with 20 years of service and may be purchased by those with 10-19 years of service. For information about the Church Pension Fund, call the toll free number 800-223-6602, Ext. 413.

How do I calculate my retirement income?

Determine your expected income from the Church Pension Fund, Social Security, investments and post retirement employment. While you can probably figure the last two yourself, it is advisable to contact the Church Pension Fund and the Social Security Administration for estimates early in your planning process. By early, we mean before you have set the date and announced your retirement. Call the Church Pension Fund on 800-223-6602, ask for the Benefits Section of Clergy Pension Services. Request an estimate of your pension. To find out about Social Security you can do two things. First, you can get a report of your quarters and earnings that will show whether you have met the basic eligibility requirements. This you can do by calling Social Security. Then, with that information in hand, you can call or visit your local Social Security District Office and get some help in calculating your expected monthly payment.

How do I apply for retirement benefits?

Now that you have made some careful estimates of your income and expenses do you know and when to apply for retirement benefits? After you have talked with the Bishop, and told him of your decision, your next step might well be a call to the Church Pension Fund office. If you haven't already asked about when to apply, ask now. (Three months ahead of the effective date is not too early). Find out what documents you need to submit. Find out when you can expect your first check. It usually comes in the first month of retirement, but things do not always go as expected. Make sure you have enough in savings or liquid assets to keep you going and to meet unexpected needs for three months. To repeat, the office to call is the Benefits Section of Clergy Pension Services, toll free number 800-223-6602.

After you have the information you need about the Church Pension Fund, talk to the people at the Social Security District Office. There are offices in DC and Maryland. Check the phone book for the one closest to you. See what you need to do and have to do to file a claim. Again find out about schedules. (If you have problems getting information on Social Security, The Business Affairs Office [202-537-6522] might be able to help you find some answers).

Talk to both the Church Pension Fund and Social Security offices about exactly what your monthly benefit is going to be. While it is likely that neither can give a guaranteed precise figure, each can give you a very close approximation. If the figure either gives you differs much from what you had gotten in the early planning stages or had calculated yourself, go over the calculations with the office to see why the difference. Do not be bashful about asking questions. (Keep in mind the old saw that the only dumb questions are those not asked.) It is your income that is being discussed, the benefits that you earned. It may not seem important to the people you are talking to, but they will understand and respond to your interest.

The Church Pension Fund provides a resettlement benefit of up to \$6000 for retiring clergy who were active in the Diocese at the time of retirement. When you are talking with the Pension Fund office they will tell you about this benefit. (Ask if they don't.) You will be told if you are eligible and how much you might receive. At the time of your retirement you will be provided information on the tax status of the benefit.

Where am I going to live?

If you are planning to stay where you are, in a house you own, or are paying for, your concerns in this area relate to the change from receiving a tax free housing allowance to receiving a pension, part of which may be considered a tax free housing allowance. While these considerations are not minor, at least the costs can be calculated.

If you are living in a rectory, you are going to be moving. Your move can be to a retirement community or home, in this area or elsewhere. Or you can be moving back to a house you own here or elsewhere. Or you can be moving to Florida or Arizona. In any event your situation will change. Any place you move involves financial and social considerations. You can calculate the financial considerations with some sense of certainty. Can you do the same for the social considerations?

Think carefully about becoming part of a new community, of finding new friends, of finding ways to continue interests you have developed in your life so far. Prepare yourself, to the extent possible for the stresses involved in making such a change.

Are you prepared to change your role?

While once a priest always a priest, the day you step out of that pulpit for the last time you give up one role and assume a new one. You change from being the rector of a parish or an assistant to the Bishop to being a retired priest. Are you ready for this? While you may think you are the same person, others will not. You no longer have the trappings of your parish or diocesan position. While you can still celebrate the Eucharist it will be with the permission of someone who is what you were or within your own family.

You cannot practice this role change, you can only expect it to happen. Be prepared to talk with family and friends about it. While it can be quite upsetting, it also has its good points. Weekends free other than in August. No more sermons to worry about. No more late night calls of emergencies to be attended to. An opportunity to worship as an individual.

How do I set a date for my retirement? (mandatory retirement age is 72)

When is it right to retire? No two priests will come up with the same answer for the same reasons. Every case is different. Every final decision a compromise. The choice of a particular date is a combination of age, length of service in a parish or position, income expected, income needed, energy, feelings of spouse, dependents and family, health of self and family and at least as many more individual considerations pertinent to a particular case.

Sometimes suggestions as to a date can come from an outside source - such as your parish, or the Bishop. No one really wants to stay after he or she is not longer wanted or needed. We should keep our ears, minds and hearts open to signs that we are reaching the point when we should move on. The only option may be retirement.

How do I leave my parish or other position?

How do you leave a place that has taken so much of your time, your energy and your love? Particularly when you are not going to another similar situation. How do you say goodbye? When do you tell the wardens, the vestry and the parish family, your supervisor, the Bishop? While there is no right answer to these questions that meets every case, the best answer is sooner rather than later. In most cases no one benefits from decisions either made or announced close to the effective date. Making and announcing the decision well in advance give you and the parish or other organization you are leaving plenty of time to adjust to the fact of your retirement. It gives the parish an opportunity to do some planning for an interim rector and to start on the planning for a permanent successor. While you might think that it will make you a lame duck if you announce your retirement more than a month or two in advance that is not necessarily true. If you make the announcement six months to a year in advance, you and your parish will have time to think of you as a lame duck and get over it and your last few months can turn out to be a productive period for both your ministry and the parish's growth. Giving decent advance warning to the parish will also avoid any possibility of bad feelings that you are deserting them without decent notice, and maybe more important, give you plenty of time to come to closure on projects or individual counseling situations, with all parties understanding that there has to be an end to the relationship.

The determination of the length of time between an announcement and the date of departure is a compromise for you as well as the parish. You want the time long enough so you aren't rushing off before you and the parish are truly ready. But, you don't want to be around very long after you and the parish are ready for the leave taking.

As a parish priest what is my role in choosing an interim or permanent successor?

A retiring priest has little involvement in choosing a successor. You will have to use your own judgment in answering questions and requests for guidance from the wardens and vestry, but your stance should be hands off. This Diocese has an established process and you should contact the Diocese for further information.

What involvement should I have in the parish after my retirement?

None! Put yourself in the place of the interim or permanent successor. Would you want to have your predecessor second guessing you? Stay away. Don't even do weddings or funerals unless specifically asked by the present rector. Even then need to be persuaded.

How will my parish and I make the separation?

What are the closing events? There will be a variety of social events, depending on the parish's traditions and what you are open to. There will also be last vestry meetings and a last service. There is a Service for Ending a Pastoral Relationship in the Book of Occasional Services. It will be almost impossible to keep control of all the closing events. You mustn't worry. The parish is doing some things for themselves, not for you. One word of advice. Do not let anyone else preach on that last Sunday. You have earned that privilege. Use it to make your formal valedictory. A second word of advice. Don't spring any big surprises on the parish in that sermon. If you have anything but goodbye to say to the parish, say it earlier. A last sermon is no time for criticism or exposes or confessions.

What will my life be like after retirement?

What are you going to do with your time after retirement? If you are like most retirees that won't be a problem. You will find yourself wondering how you ever had time for all those things you did as an employed priest. Are you going to try to keep your hand in as a priest? If you are staying in this area you will probably be able to find supply and assisting work. If you move away it may take some time to become part of the community and become well enough known to get those calls. It is going to be up to you. It will require some effort. If you are not going to continue as an active member of the clergy you will just have to learn to say no when opportunities are presented.

Or do you want to do something entirely different? Or do nothing that is income producing? Your need for additional income may be the governing factor. However, it is more likely that a need to fill time, or what you think is a need to fill time, will drive you to seek things to do. Don't be surprised if you are comfortable for a significant period of time, particularly on Sunday mornings. Accept the fact that you have made a big change in your life. One of the authors of this pamphlet felt particularly edgy every Monday morning for months. His wife helped solve that problem by letting him do the wash.

Allow yourself time for things that you want to just try. Let a hobby grow from an hour or two a week to six or eight hours. Take a nap after lunch. Read the whole paper in the morning instead of just the comics, front page and sports. Above all, don't feel guilty. You have earned your retirement. Use meditation and prayer to help you through this crisis just as you have used them to help you through other crises. Get more exercise. Exercise, a good long walk or swim or bike ride, can lessen tension and stress and clear the mind.

Don't think that just because you are retired that you are no longer useful. You will probably find that your energy will increase, you will sleep better and eat more sensibly within a few months of retiring.

Talk about any problems you have with the people around you, your family and friends. Your retired friends are a particular good source of advice. They have been through what you will be going through. (You may not experience any problems. Your decision may be well enough timed and planned, or you may just be so ready that the only feelings you have may be of satisfaction for a job well done or of relief).

The Fellowship of St. John is an organization of retired clergy canonically resident in the Diocese of Washington. It can be a source of help and support to you. Call Church House for information on current leadership - 202-537-6555.

Am I going to have to give up a lot of friends and move away from my family?

Remember, you are only retiring, not joining a closed order. There is no reason to give up personal friends. (Business acquaintances are something else - those disappear with the work you did). And family are still family. If you leave the area it will be harder to keep up some of the social attachments, but remember, you will have more time for travel. You will have time to visit people (even on weekends). Don't cross off friends. See which friendships keep going naturally. Work on keeping in touch. Write a few more letters.

Be prepared to make new friends. Retired people seem more gregarious than most. They have time for casual relationships that can blossom into friendships.

1.9E - ACTIONS AT DEATH OF CLERGY

In the event of the death of a cleric active in a parish, the parish will have to make decisions which will affect the cleric's family.

The following guidelines are intended to be helpful to a rector and/or senior warden and the vestry as they develop policies and procedures to follow upon the death of a clergy.

(1) Funeral Arrangements

- (a) Notify the Bishop.
- (b) Notify the Church Pension Fund upon the cleric's death.
- (c) Help with the selection of a funeral home.
- (d) Decide upon the appropriate services and how they will be conducted (vigil, wake, vestments).

(2) Financial Considerations

- (a) Provide financial support for family:
 - 1. Death settlement of six month's pay with housing allowance, or;
 - 2. Continued salary with benefits for six months from date of death.

- (b) Help to secure social security benefits for the family.
- (c) Plan for the care of a surviving minor.
- (d) Help to secure other monetary/financial support:

- 1. Veterans' benefits
- 2. Insurance benefits
- 3. Educational scholarships from diocese

(3) Housing

- (a) Allow family to remain in parish supplied housing for six months or continue the housing allowance for six months.
- (b) Help in relocating the family, if this is needed.

(4) Insurance Coverage

- (a) Continue health insurance for six months from date of death.
- (b) Provide life insurance for spouse if there are minor children.

(5) Counseling for Family

- (a) Provide emotional support for the family during the bereavement period.
- (b) Acquaint the family with the various resources and assist them in securing the appropriate supports and funding to meet their needs.

(6) Additional Recommendations for Parish Consideration

- (a) Set up income insurance through the diocese for the family into which the parish can contribute or pay premiums on a monthly basis.
- (b) Help family to secure adequate housing.
- (c) Develop a support group within parish.

1.9F - WECA GUIDELINES

WECA has developed guidelines for the use of clergy. One of these, "Responsibilities of Clergy for Self" is included in these guidelines. Other guidelines, "Confidentiality", "Discretionary Funds" and "Sexual Exploitation" are available at Church House.

WASHINGTON EPISCOPAL CLERGY ASSOCIATION GUIDELINES

3-12-92

RESPONSIBILITIES OF CLERGY FOR SELF

As Deacons and Priests we have promised to pattern our lives [and those of our families, households, or communities] in accordance with the teaching of Christ, so that we may be wholesome examples. One part of this commitment is to care for God's gift which we embody in ourselves and thus to proclaim in deed as well as word the Gospel of Jesus Christ by fashioning our lives in accordance with its precepts. The following are suggestive of some of the ways that we express this care:

1. We give adequate attention to our spiritual health, we observe daily times for prayer, scripture reading, and meditation, and regular retreats with the Daily Offices as the guide in our tradition.
2. We give adequate attention to our physical health, including regular check-ups, regular exercise, healthy eating habits, and moderation/abstinence in any use of tobacco, alcohol, or other drugs.
3. We give adequate attention to our emotional health and when there is need, identified by ourselves, our friends or colleagues, will seek professional help.
4. We observe at least one and a half days off work each week and endeavor to enlist our parishioners' support in honoring these times of rest.
5. We take one full month each year for vacation as time for recreation and renewal, plus a week after Christmas and Easter.
6. We make every effort to reach mutual agreement with our congregations and or ecclesiastical authority to plan for periodic sabbatical leave for refreshment, renewal and growth.
7. We maintain a regular program of continuing education in consultation with clergy colleagues, bishop and congregational representatives using Diocesan Personnel Guide Lines. At least every 5 years we give concerted effort to an examination of our professional and vocational development.
8. We maintain regular contact with other clergy through WECA and colleague groups.
9. We spend intentional and significant time with our family, household or community.
10. We seek avenues of community involvement and/or friendships which allow us to relate to others where we are not priest/congregational leader.
11. We practice responsible stewardship of our financial resources. We accept the tithe as a minimum standard of giving, and if we are not already tithing adopt a systematic plan of moving towards that minimum.