Clergy Manual

The Episcopal Diocese of Alabama

2026

Selected Policies for the Support of Clergy within the Episcopal Diocese of Alabama

Our Mission

To proclaim by word and example the Good News of God in Christ, to seek and serve Christ in all persons, loving our neighbors as ourselves, to strive for justice and peace among all people, and to respect the dignity of every human being.

Our areas of focus are:

- Congregational Vitality: Building up communities of Christian faith
- Leadership Development: Raising and empowering leaders
- Racial Healing: Creating pathways for racial healing
- Camp McDowell: Sharing the Good News of God in Christ

Further information, greater detail and necessary forms can be found on the diocesan website. The diocesan journal contains parish information, diocesan department and committee information, diocesan canons and standing resolutions.

MAP OF CONVOCATIONS WITHIN THE DIOCESE OF ALABAMA

V-6

Convocations

The Diocese of Alabama is divided into seven convocations and three electoral caucuses, Northern, Middle & Southern. Support is provided to congregations in the respective convocations by the Dean of the convocation.

Northern District	Middle District	Southern District
Convocations	Convocation	Convocations
Tennessee Valley	Birmingham	Black Belt
Mountain		Montgomery
Cheaha		East Alabama

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Policy for the Protection of Children, Youth and Vulnerable Adults

I. LETTER FROM THE BISHOP

Beloved in Christ,

Jesus teaches that the children among us are to be welcomed and nurtured. They possess a crucial openness and trust serving as an example for all. They model for us an entry into life in God's kingdom.

It is their very openness and trust which also makes them vulnerable to harm. It is our responsibility to become aware of the ways in which some people abuse children, and to protect them from these predators.

For this reason all leaders in the church and all adults who have regular contact with children and vulnerable adults in our ministries should be familiar with this policy and complete the required and associated training. Unless we are vigilant in this effort, we may fail in caring for some of the most vulnerable among us. We also risk seeing our programs and ministries fail as the result of an incident of abuse within the ministry.

I am grateful for your commitment to read this policy, complete the training and join in this important and sacred task.

Sincerely,

The Rt. Reverend Glenda Curry

II. EXPECTATIONS AND LOCAL IMPLEMENTATION

This policy supersedes earlier policies and procedures published by the Diocese of Alabama. It builds upon, strengthens, and in some cases, alters procedures and practices published in previous editions in 1994, 2000, 2006, and 2014. These policies and procedures have been developed in general conformity with the *Model Policies* published by the General Convention of the Episcopal Church in 2018. These policies are applicable to all canonical or licensed clergy of the Diocese of Alabama, all employees and volunteers serving within parishes, ministries, and entities within the Diocese including groups, ministries, and organizations using church owned facilities.

The Diocese of Alabama prohibits sexual misconduct and sexual abuse by all church workers and seeks through these policies and procedures to provide an environment safe from these prohibited activities for the children, youth and vulnerable adults who participate in the programs and activities of its parishes and associated institutions.

No person shall be regularly (whether frequently or infrequently) placed in a position of ministry with children or youth who is not known to other Church Workers in the parish. No person previously convicted of sexual misconduct may be placed in direct contact with children or youth.

Implementation of these policies is the responsibility of the clergy, wardens and vestries of all parishes in the Diocese of Alabama. The boards and officers of all church-related organizations are also charged with responsibility for implementation. Conformity with these policies and procedures by outside groups and organizations using church-owned facilities is required for those events, programs, and ministries operating in church-owned facilities and shall be monitored by the clergy and wardens of associated parishes or, in cases in which the facility is directly operated by the Diocese, by the Diocesan Bishop. Support and guidance in the interpretation and implementation of these policies shall be offered by the Bishop through the Office of the Bishop.

No policy can foresee every possible circumstance to which it may be applied. Any additions or modifications by local leadership to these policies may be made only with the written approval of the Bishop or the Bishop's designate. Also, any presentation or teaching based on these policies should be approved by the Office of the Bishop.

Whenever applicable, questions of civil, criminal, and/or ecclesiastical discipline and employment offenses should be addressed with the relevant authorities immediately. Please contact the Office of the Bishop for consultation and resources if assistance is needed.

III. DEFINITIONS

NOTE: These definitions reflect our understanding of terms some of which are evolving as these policies are being written.

Abuse: Abuse includes **physical abuse** (non-accidental injury intentionally inflicted upon a child, youth, or vulnerable adult), **sexual abuse** (any sexual content, indecency, or activity of a sexual nature with a minor, or vulnerable adult), and **emotional abuse** (mental or emotional injury to a child or youth that results in an observable and material impairment in the child's, youth's, or vulnerable adult's growth, development, or psychological functioning).

Adult: Anyone who is 19 years or older and not in high school.

Bullying: Behavior that intimidates, humiliates, offends, degrades, or harms another person, whether verbal, psychological, social, physical, or otherwise.

Church Worker: These policies apply equally to volunteers and to employees unless a specific exception is stated. For purposes of these policies a Church Worker may be employed and compensated or may be a volunteer.

Clergy in Charge: A member of the clergy who is in charge of a program for children and youth. In a congregation, this is the head of the congregation unless the head has appointed another clergy staff member as the Clergy in Charge of the program.

Diocese: The Episcopal Diocese of Alabama

Head of Organization: The person who is the canonical head of a congregation or the chief executive officer of an organization, such as a head of school or executive director.

Intake Officer: The person(s) designated to receive information regarding an offense for which a member of the clergy may be held accountable under *Title IV of the Constitution and Canons of The Episcopal Church,* which sets out the disciplinary process for clergy.

LGBTQ: An acronym for Lesbian, Gay, Bisexual, Transgender. It refers to people whose sexual orientation is not heterosexual or whose gender identity or expression vary from their sex assigned at birth.

Mandated Reporter: A person who is required by state law to report reasonable suspicions of abuse, neglect, and/or exploitation of vulnerable populations to the appropriate state agency. In Alabama mandated reporters include clergy and others, even volunteers, who "render aid or medical assistance to any child, when the child is known or suspected to be a victim of child abuse or neglect."

Neglect: The failure to provide for a child's or youth's basic needs and/or medical needs or to take action to protect a child or youth from harm.

Off-Site: Any location other than the sponsoring Episcopal Church, institution, facility, or campus.

Organizations: All institutions for which the diocese or congregations have legal or fiduciary responsibility (examples: diocesan departments, commissions, conference & retreat centers, adult day care centers, retirement communities, religious orders, congregations, schools, etc.).

Overnight: Any event that starts on one calendar day and ends on a different calendar day.

Pastoral Relationship: Any relationship (1) between a Member of the Clergy and any person to whom the Member of the Clergy provides or has provided counseling, pastoral care, spiritual direction or spiritual guidance, or from whom such Member of the Clergy has received information within the Rite of Reconciliation of a Penitent, or (2) between a lay minister and any person to whom the lay minister is offering prayer, ministry, and/or any person from whom the lay minister has received sensitive, personal, or confidential information in the course of offering ministry.

Peer Abuse: Any bullying or abuse occurring between children, between a child and a youth, or between youth.

Programs: Official activities and programs sponsored by the diocese or its organizations. Such as but not limited to Acolyte Festival, EYC, Sawyerville Camp, Summer Camp at McDowell Camp & Conference Center, Special Session, Foothills Day Camp, Youth Department etc.

Public Records Check: A search of documents and data available to the public including criminal and civil court records, credit reports, and driving records from the department of motor vehicles. Typically, such searches are conducted by a third party with expertise in this area.

Qualified Adult: A Qualified Adult is an adult who is (i) screened and trained in Safeguarding to work with children and youth, (ii) not a Vulnerable Adult, and (iii) at least two years older than the oldest participant in the program.

Responsible Person: The person designated as being accountable for compliance with this policy for an event or program. Such person must be (i) a Qualified Adult who has been trained and screened under these policies and (ii) physically present during the event.

Sacramental Use: Consecrated or unconsecrated wine used in the setting of Holy Communion.

Sexual misconduct: A broad term encompassing any behavior of a sexual nature that is committed without consent or capacity for consent or by force, intimidation, coercion, or manipulation. Sexual misconduct can be committed by a person of any gender, and it can occur between people of the same or different gender.

Supervisor: A person who has oversight responsibilities for a ministry program and/or leaders in a ministry program.

Title IV: A section of the Constitution and Canons of The Episcopal Church pertaining to clergy professional standards, accountability and ecclesiastical discipline.

Training: Organized activity designed to provide information and/or instructions to strengthen and enhance the recipient's understanding, capacity, and exercise of ministry.

Transgender: An adjective describing a person whose sense of personal identity and gender does not correspond with the gender or sex assigned to them at birth.

IV. APPLICATION AND SCREENING

Congregations and other organizations are required to screen all persons according to the standards in the ***Screening and Training Charts***. For some positions, screening consists only of a Public Records Check. For other positions there are additional screening requirements such as a written application, interview, and reference verification.

A. Public Records Checks

- Congregations and other organizations must submit background check release forms for public records checks to the Diocese. All background checks must be conducted through the Office of the Bishop. Such checks must be completed before the employee or volunteer begins interacting with children and youth.
- Criminal public records checks shall include available criminal records and sex offender registries.
- A Department of Motor Vehicles (DMV) records check is needed if transporting children and youth as part of, or an extension of, ministry of the church or for a church-sponsored event. The check should be repeated every five years when applicable.
- Sexual Offender Registries must be reviewed prior to anyone beginning work with children and youth. The Sexual Offender Registry is first checked during a background check and shall be checked by the parish every five years so long as the person remains active in ministry or works with children and youth.

B. Additional Screening Requirements

Written application, interview, and reference verification are required for individuals employed with any potential for working with children, youth and vulnerable adults. These procedures must be completed in addition to public records check, training, and sexual offender registry check prior to any contact with children and youth. Documentation of each procedure is to be retained in the employee file indefinitely. If these procedures are not complete when the job is offered, the offer shall be conditional pending completion of all screening requirements. Where required, these components are generally conducted in the following order:

- Submission of a completed written application to serve in a specified role with a clearly defined, written job description. The application includes verifiable personal information.
- Personal interview.
- Reference verification conducted by congregations and other organizations to verify personal information and check references listed in the application (people who know but are not related to the applicant); and
- Maintenance of these records as described below.

Volunteer leaders or Supervisors must be known and active in the congregation for at least six months before engaging in ministry with children and youth.

Congregations and other organizations must keep and maintain all application and screening records secure and confidential in the diocesan, congregational, or organization office. This includes a signature by each applicant verifying receipt of a copy of this policy, including any local procedures or variations. These records shall be retained permanently.

V. EDUCATION AND TRAINING

Training shall be appropriate to each person's function according to the ***Screening and Training Charts***. Generally, any and all people involved with children and youth shall have similar requirements for screening, training, and supervision.

All Supervisors and those with oversight responsibilities for ministry programs and/or other adults who engage in ministry with children and youth shall have Specialized Training that is tailored to their role and ministry function.

The background check and all necessary training modules must be completed prior to participation in ministry with children, youth or vulnerable adults.

Background checks and training should be repeated within a minimum of five years.

Any volunteer or paid employee (i.e. nursery workers) over the age of 16 are required to complete the necessary training modules and undergo a reference check.

Depending on role and responsibility, Specialized Training may include:

- Identification of and response to different forms of abuse and neglect.
- Vulnerability within the pastoral relationship.
- The needs of LGBTQ+ children and youth.
- The ways that children and youth can engage in self-advocacy;
- and the needs of vulnerable children and youth.
- Congregations, and other organizations with responsibility for programs with services or ministries to children and youth shall keep records sufficient to evidence compliance with this policy.
- The particular needs of people with disabilities and vulnerable adults in cases such as but not limited to respite care, Bethany's Kids and Special Session.

VI. MONITORING AND SUPERVISION OF PROGRAMS

A Responsible Person shall monitor and supervise the behavior of adults, children, and youth to ensure appropriate behavior and healthy boundaries.

All people who minister to children and youth must have ongoing supervision. Ongoing supervision should consist of regular check-ins by the Supervisor who may be parish clergy or a team leader. Such supervision should review the scope, accountability, and responsibility of the ministry with the person engaged in the ministry. Each person engaged in such ministry should know who supervises their ministry and how to contact the Supervisor or the person to whom this responsibility has been temporarily delegated.

Congregations and organizations shall ensure that all people who minister to children and youth receive training as to the scope, accountability, and responsibility of the ministry. Parishes and other entities covered by these policies are responsible for notifying the Office of the Bishop of those persons who need background checks and or training and for monitoring completion of all requirements.

The Diocese shall maintain an up-to-date list of people trained to minister to children and youth.

A. **Unrelated Adults Required**

There shall be at least two unrelated adults (at least two years older than the eldest participant) present at ministry settings and events designed for children and youth. If unanticipated circumstances result in an adult being alone with children or youth, that adult shall report those circumstances to the Supervisor, Clergy in charge, Senior Warden, or Responsible Person as soon as possible. Should an adult find themselves alone with just one minor, the adult shall immediately take steps to remedy the situation as well as immediately notifying the Supervisor.

Only one adult may be sufficient in well-monitored, visually accessible program space on the church grounds, such as a Sunday School classroom in use when normal church activities are underway and located in a portion of the building easily assessable.

B. **Creating Safe Space for Children and Youth**

To create a safe space, it is necessary to anticipate and avoid circumstances in which children and youth are exposed to inappropriate consumables, materials, unmonitored adult contact, or unsupervised peer contact.

For example:

a. **Alcoholic beverages**. Alcohol (sacramental or otherwise) shall be stored out of sight preferably in locked spaces.
b. **Computers and electronic devices.** Children and youth shall have adequate supervision when using electronic devices belonging to the diocese, congregations, and other organizations. Devices shall have adequate password protection.

c. **Persons with keys and access to locked spaces.** It is recommended that anyone with keys *or* electronic access to church buildings shall meet all the requirements for screening and training according to the ***Screening and Training Charts.***
d. **Unused spaces.** Spaces not in use should not be readily accessible.

C. **One-to-One Conversations with Children or Youth**

When one-to-one conversations occur between an adult and a child or youth, they shall occur at times when other adults are present in the church building or, if in a public building, at times when other adults are present.

Examples include:

a. Planned or unplanned on-site conversations can take place in a public location, away from where others can hear but accessible to other adults.
b. Planned off-site conversations/meetings can take place in a public place (such as a coffee shop or restaurant) in view of other adults. A parent or guardian shall be informed about the appointment or plans in advance.

Confidentiality cannot be guaranteed if a child or youth discloses a situation pertaining to abuse, neglect, self-harm, or exploitation because of mandatory reporting laws.

Impulsive, secluded or secretive activity, online or in person with children or youth, may foster a high-risk situation, and is therefore to be avoided.

D. **Basic Needs**

No one is to be deprived of the basic human needs of food, drinking water, shelter, sleep, access to restrooms, safety, and clothing at any event.

E. **Inclusiveness**

No one shall be denied rights, status or access to an equal place in the life, worship, and governance of any program or activity because of race, color, ethnic origin, national origin, marital status, sex, sexual orientation, gender identity and expression, disability, or socio-economic class. To the extent possible, all spaces and settings for programs, activities, and ministry should be accessible.

Reasonable alternative arrangements shall be made to address the safety and comfort of persons who express the need or desire for additional privacy in restroom use or other private activities. Such persons shall be offered reasonable alternative arrangements such as use of a single-stall restroom, a private area for changing clothes, or a separate changing schedule. To the extent possible, any alternative arrangement should be provided in a way that protects the ability to keep confidential the need for privacy.

This provision expressly includes requests made by persons whose gender identity does not conform to traditional gender categories. Such persons should not be required to use a locker room or restroom that conflicts with their gender identity.

Safe bathroom/shower facilities will be provided by gender (or specific times will be assigned to the use of a single facility).

Adults should either have separate shower facilities or shower at other times than the youth. Separate dressing facilities should also be provided.

Personnel shall not use harsh language, profanity, degrading language or punishment, or any mechanical restraint for behavior management.

F. **Violence and Weapons**

- No one is to strike, hit, or otherwise physically threaten or harm anyone at any time.
- Bullying or hazing of any kind by anyone is prohibited.
- Children and youth shall not have weapons of any kind at any event or program for children or youth.
- Report suspected violations immediately.

G. **Behavioral Standards for Adults in Ministry with Children or Youth**

Adults who work with children and youth are expected to model the patterns of healthy relationships that children and youth deserve in all settings including online interactions and behavior. Interactions should meet all requirements outlined above, and adults should be discouraged from initiating a private relationship with any unrelated child or youth from the church away from sanctioned church activities.

Do
Adults are encouraged to:

- Have ongoing spiritual practices, which include daily prayer, regular participation in corporate worship, and Bible study.
- Spend time with and listen to children and youth and support their ministry within the Body of Christ.
- With consent, offer appropriate physical expressions of care,
- Model appropriate affection with other adults and be accountable to the community for behavior.

DON'T
Adults shall not under any circumstances:

- Provide children or youth with non-sacramental alcohol, marijuana, drugs, cigarettes, tobacco products, e-cigarettes, vapes, or pornography.
- Offer piggyback rides or let children or youth sit in their laps.
- Arrive under the influence of alcohol, illegal drugs, or misused legal drugs at any children's or youth event or when they are responsible for children or youth at an event.
- Consume non-sacramental alcohol or illegal drugs or misuse legal drugs at any children's or youth event or when they are responsible for children or youth at an event.
- Communicate, including via text or online, with children, youth, or youth parents while under the influence of alcohol or illegal drugs.
- Engage in illegal behavior or permit other adults or children or youth to engage in illegal behavior.
- Engage in any sexual, romantic, illicit, or secretive relationship or conduct with any child or youth.

Anyone who suspects a violation of these policies shall report their suspicions immediately.

H. **Special Considerations for Off-Site Programming**

Off-site programs, trips, and events are welcome and meaningful opportunities for spiritual, social, and emotional development of children and youth. They also present additional challenges for maintaining best practices for safe and healthy ministry. The expectations for safe space, as described above, should be observed off-site. In the event of uncertainty about application of the policy, the Responsible Person should contact their Supervisor with the relevant queries.

Because of the unique risks that can't always be anticipated, it is important to obtain permissions and manage documentation as described below.

1. **Prior Approvals**
    - Prior approval by a member of the clergy in charge or the governing body in the absence of a clergy person
    - Written parental approval is required prior to viewing any movie, whether off-site or on-site, rated "PG-13" or above, or participating in any conversation or program containing sexually explicit or violent content.

2. **Registration, Waiver, and Release Forms**

- All children, youth, and adults shall complete and sign a registration for and/or permission form as appropriate and a liability waiver and photo and/or social media release form before participating in any programs. Confidentiality must be preserved with respect to medical and other sensitive information in the forms. Such forms can encompass a program year.
    - There must be a parent/guardian's signature on all release and waiver forms for minors. Electronic signatures are permitted in Alabama (2006 Alabama Code - Section 8-1A-7)
- Completed release and waiver forms shall be maintained in a secure location on-site or online. Forms should be held for a minimum of 365 days.
- Permission slips shall be provided for each off-site event or for the yearly offsite programming for a discrete program such as the Youth Department. Forms shall be signed by the parent/guardian.
- Prior permission for a minor to be photographed or recorded on film, video, audio, or other electronic media for the publications and social media is required from a parent/guardian.

3. First Aid and Medications

- Current certification in First Aid, CPR, and Automated External Defibrillator (AED) is strongly encouraged for those who work with children and youth.
- A first aid kit, appropriately stocked for the event and participants, shall be available in an easily accessible location.
- A record must be kept for all medication or first aid given to a participant. This record shall include the participant's name, the date and time of service, the name of the person administering medication or treatment, and a description of the medication, dosage, and/or treatment given.
- All medications (prescription and over the counter) belonging to minors shall be given to the Responsible Person, unless otherwise agreed upon by the parents and the Responsible Person. Exceptions may include rescue medications.
- Only the Responsible Person, or their adult designee, shall administer medications.

4. Supervision

- At any gathering of children or youth, there shall be at least two unrelated adults with one being age 25 or older, preferably reflecting the sex and gender identity of the participants. During overnight events there must be at least one female and one male chaperone with mixed gender groups.
- Minimum ratios of adult to child/youth shall be in accordance with American Camp Association (ACA) guidelines as follows:

- 5 years & younger — 2 adult for the first 5 overnight-participants and 1 adult for each additional 6 day-participants
- 6–8 years — 1:6 for overnight, and 1:8 for day
- 9–14 years — 1:8 for overnight and 1:10 for day
- 15–18 years — 1:10 for overnight and 1:12 for day

I. Overnight Programs

- The safe use of restrooms and showers by all participants requires consideration of numerous factors, including, but not limited to age, sex, gender identity and expression, and privacy. Adults should have separate showers or separate times for showers.
- Overnight programs shall provide safe, supervised sleeping arrangements.
  - No bed, cot, or sleeping bag shall have more than one person sleeping in it.
  - Supervision by two unrelated adults is required in any space where youth are sleeping.
  - It is acceptable for all participants to sleep in the same open area when dressing rooms and bathrooms provide appropriate privacy.
- Participants shall be given the opportunity for at least seven hours of sleep each 24-hour period, except for programs where parental/guardian permission is given to miss sleep. In these cases, children and youth must agree to participate in writing, and parents or guardians must give written permission that includes certification that the youth or child does not have a medical condition that would put the participant at risk by missing sleep.
- Participants shall have some time set aside each day for rest or free time.

Best practice guidelines for hotel stays:

- One child or youth per bed, including cots, pullouts or hideabeds, and rollaway beds.
- At least 2 children or 2 youth in each room.
- Adult supervisors or chaperones have rooms on the same floor, scattered among the rooms with children or youth, adult leader assigns rooms and room occupants.

J. Transportation

- For the health and safety of all participants, the following practices shall be followed: for events that originate and/or terminate at a diocesan facility, congregation, or related organization's facility all drivers must be at least 21 years of age and provide proof of insurance and a current driver's license, a completed volunteer driver information form, and have a satisfactory DMV records check.

- All drivers and riders must comply with state laws including seat belt and cell phone usage.
- Parents/guardians are responsible for the transportation and safety of their children and/or youth to and from the event. This responsibility includes the transportation of any other passengers in their vehicle.

K. Camps and Retreat Centers

To maintain the highest possible standards of safety and accountability while recognizing that certain structured diocesan programs—such as Sawyerville, Vacation Bible School (VBS), and parish or diocesan youth retreats—operate under staffing models that may not meet full American Camp Association (ACA) ratios. This policy establishes a chain-of-command supervision model consistent with diocesan safeguarding principles.

This section applies only to organized, pre-approved programs conducted under the authority of the Episcopal Diocese of Alabama or its designated ministries and parishes.

Definitions

- Youth Staff/Chaperone: A participant age 16 or older who has completed all required Safeguarding God's Children training and serves in a supervised leadership or support role.
- Adult: Any individual age 19 or older.
- Supervising Adult: An adult age 25 or older who holds responsibility for oversight of youth staff and program operations.
- Director/Clergy: The on-site program leader, rector, or chaplain responsible for ensuring compliance with diocesan policies.

Supervision Requirements

- A minimum of two unrelated adults, both age 19 or older, must be present at all times during programming.
- At least one adult age 25 or older must serve as the Supervising Adult, Director, or Clergy in charge.
- Youth Staff/Chaperones (ages 16 and older) may assist with rotations, small groups, or activity supervision only under the direct oversight of the supervising adult(s).

L. Travel

Travel with children and youth present opportunities for participants to experience the church and the world on a larger scale with different perspectives of faith communities and their contexts. It also presents challenges to normal safety protocols. The following policies will help groups prepare for a variety of potential scenarios, as well as for domestic and international travel.

1. Adult Leaders and Chaperones

- Minimum ratios of adult to youth need to be greater due to the possibility of leaving an adult behind with a participant in the event of a medical emergency.
  - 9–14 years — 1:5
  - 15–18 years — 1:7
- It is preferred that no group should travel with fewer than three adult chaperones. If the Travel includes an overnight stay the ratios for overnight events must be observed.
- One adult, minimum age 24, should serve as the travel administrator who is responsible for all aspects of the trip, including carrying all necessary documentation, contacts, and forms including:
  - medical releases;
  - community covenant;
  - emergency contacts;
  - itineraries; and
  - cash and/or credit card capacity to address emergencies.
- One person should be designated to supervise the administration of medications as instructed on medical release forms, and a clinic near your destination should be identified ahead of time in order to respond to health emergencies as rapidly as possible.
- A copy of all documents should be left with an accountable person at the diocesan, congregation, or organization's office. That person should also serve as the local emergency contact person for communication between the traveling group and families at home.

2. Insurance for Travel

- For major travel short-term trip or supplemental insurance, available through most church and organization's policies should be added as a rider.
- It is recommended that all travelers carry evidence of personal health insurance by virtue of a copy of the actual card provided to the insured person.

VII. RESPONDING TO CONCERNS

A. Suspected Abuse, Neglect, or Exploitation of Children and Youth

Any adult who has reason to suspect that abuse, neglect, or exploitation of children or youth has taken place, is strongly encouraged, and all mandated reporters are required to contact Child Protective Services.

In addition, anyone who has reason to suspect that abuse, neglect, or exploitation of children or youth has taken place within a facility or program of the diocese, congregation, or other organization, should immediately inform one of more or the following:

- The Bishop or the Office of the Bishop
- Clergy in charge or the Senior Warden in the case of a congregation without a clergy person.
- The director, head, or other governing officer in the case of other organizations; and/or
- The Intake Officer in any case in which a member of the clergy is suspected of abuse, neglect and/or exploitation.
- Should the allegations involve a bishop, a report shall be made to the Office of the Presiding Bishop of the Episcopal Church USA.

B. Response of the Bishop Diocesan

The Bishop Diocesan, upon hearing reports of possible violations or abuse by clergy, or by laity at diocesan events, shall be responsible for providing appropriate pastoral care to all those affected and appropriate remedial and/ or disciplinary action, up to and including canonical disciplinary action, as provided by Title IV of the Constitutions and Canons and/or termination of employment or unpaid ministry with the diocese.

C. Suspected Violations of this Policy

Anyone who suspects a violation of these policies shall immediately report the violation to the Responsible Person, and the Clergy in Charge. Note that an accusation that these policies have been violated is not the same as an accusation of actual abuse. Violations of these policies and procedures are often referred to as a "boundary violation."

Clergy in Charge receiving reports of violations of this policy shall be responsible for taking immediate steps to ensure compliance with these polices. Any activity or event not being conducted according to these policies may be prematurely ended if such actions seem necessary to protect the participants.

Anyone who suspects a violation of these policies by a member of the clergy shall immediately report the violation to the Intake Officer of the diocese or to a Bishop serving within the Diocese of Alabama.

VIII. POLICY ADOPTION, IMPLEMENTATION, AND AUDIT

A. Adoption and Implementation

The Episcopal Diocese of Alabama shall ensure that all programs and events within the diocese involving children and youth comply with the standards set out in this policy.

B. Congregation and Organization Adoption, Implementation, and Audit

Congregations and organizations may adopt ***additional*** **policies and procedures so long as those policies and procedures are** consistent with and/or exceed the requirements in this diocesan policy and those additional policies and procedures are approved by the Office of the Bishop.

Notice of this ***Policy for the Protection of Children, Youth and Vulnerable Adults*** shall be posted in an area where activities take place, and the Policy shall be given to all paid and unpaid persons who minister to children or youth. The name, phone numbers, and email addresses of the member of the clergy in charge, or the head of congregation in a vacant cure and a contact person in the Office of the Bishop shall also be provided.

Each congregation and organization is required to conduct a ***Safe Church Self-Audit*** annually to confirm compliance with safe church policies, and to report such audit to the bishop's office.

Procedures to be confirmed by audit will include (but are not limited to):

- Availability of and safe retention of public records checks, application forms, records of screening and reference verification of paid and unpaid persons involved in ministry with children and youth.
- Availability of and safe retention of Records of compliance with ***Screening and Training Charts.***

Expectations of Clergy

Terminology: "Clergy"

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

Membership in the Clerical Order

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

Clergy Orientation

All clergy new to the Diocese, or who have accepted a new call within the Diocese, are expected to attend Leading in Hope as part of their orientation to the diocese. The course meets monthly from September-May.

Attendance at Meetings

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

Background Checks

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

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

The only clergy who may be exempted from these requirements are retired clergy who certify to the Bishop that they are completely retired and do not exercise their ordained ministry in any context.

Sexual Misconduct and Sexual Harassment Prevention

All members of the clergy are required to satisfy the training outlined in the *Policy for Protection for Children, Youth and Vulnerable Adults*.

Members of the clergy who have received Safeguarding God's Children or Safe Church training in another diocese may receive credit for training that is current and duplicates what is required by the Diocese. Clergy applying for licensing will be fully licensed only after the required training is complete. Those who have been previously licensed will not have their license renewed unless they continue to meet this requirement. In addition to the required training, all clergy in the Diocese must sign (1) the Drug and Alcohol Policy, (2) Drug and Alcohol Acknowledgement, (3) Covenant for Sexual Responsibility, and (4) Clergy Statement of Sexual Conduct.

Discretionary Funds

All clergy are expected to know and follow the Diocese of Alabama policy on the use of discretionary funds as outlined in this manual. Members of the clergy who use discretionary funds for personal use may be subject to income tax reporting requirements, as well as ecclesiastical, civil, and/or criminal penalties.

Identification of Candidates for Ordination

All clergy are to encourage possible vocations to ordained ministry, being attentive to persons in the local setting who may have such gifts. The Canon for Vocations and Community Engagement, in consultation with the Bishop and coordination with the Commission on Ministry, oversees the discernment process for Holy Orders.

Clergy also have the responsibility for redirecting nominees whose gifts may not support an ordained vocation, rather than nominating candidates who are unfit for ministry and unlikely to be accepted at the diocesan level.

Pastoral Relationships after Transition

The Bishop expects that once a clergyperson leaves a congregation, he or she will bring closure to pastoral relationships with members of that congregation. The health of the congregation is dependent upon how well the transition is managed. Former parishioners should understand from the clergy in a positive and affirming way that a pastoral relationship ends when the clergy leaves the congregation.

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

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

Clergy Wellness

Clergy are expected to attend to their physical health, emotional, and spiritual wellness, and to their personal relationships. This is vital for the mission of the Diocese.

Clergy Addiction and Recovery

Clergy with a Substance Use Disorder are responsible for their own recovery. The Diocese of Alabama will provide resources for assessment, recovery, and support. Substance Use Disorder is a progressive condition; it will not get better or go away without treatment. Therefore, clergy who think they may have an addiction issue are strongly urged to seek diocesan guidance and support.

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

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

Finances

Clergy are expected to conduct personal finances with integrity, living within their means and modeling good stewardship. Should a clergy person find themselves in financial difficulty, they are encouraged to seek appropriate help from financial experts outside of the parish. Clergy are prohibited from receiving or requesting personal loans, substantial gifts and/or money from parishioners. The finance teams of the Church Pension Group and the Diocese of Alabama can offer guidance for negotiating financial challenges.

Sabbatical

The provision of benefits for clergy is made by agreement between the clergy and the vestry of each parish. The guidelines are highly recommended, though not imposed by canon, in the Diocese. At a minimum, sabbatical leave for at least three months with full pay should be granted, and funded, for all full-time clergy after five completed years of service in that parish. Funds should be accrued in each annual budget for each eligible clergy person for this purpose. The costs of supply clergy during this period will be borne by the parish. Proposals for sabbatical leave, including dates and other special requirements, must be submitted to the vestry and to the Bishop for approval. Sabbatical leave scheduled for other than three consecutive months at full pay may be considered when the case can be made for a unique development opportunity that calls for another arrangement.

Moral Discipline

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

Diocesan Participation

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

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

Immigration Matters

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

Constitution & Canons

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

Pastoral Counseling

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

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

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

Social Media

A priest, deacon, or bishop is always a priest, deacon, or bishop. All postings, whether on the clergy's personal social media accounts or the church's social media account, should reflect appropriate boundaries and respect for all people.

Prayer Book

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

Trial Use

Congregations may request permission from the Bishop for trial use of materials approved by General Convention.

Enriching Our Worship

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

Anglican Prayer Books

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

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

Baptism/Confirmation/Reception

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

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

Confirmation: Confirmation is the normative rite for adults who desire to make a public affirmation of their faith and commitment to the responsibilities of their baptism, following instruction in the faith of the Church.

Adult confirmed members are therefore those who have been baptized, confirmed, and are at least 16 years of age.

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

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

Expectations of Licensed Clergy

Licensed clergy are welcome in the Diocese and are encouraged to participate fully in its life. Please request the application for license from the, Executive Assistant to the Bishop. Licensed clergy are subject to the same expectations outlined in the Expectations of Clergy, including Background Checks and Sexual Abuse Prevention. To be added to the supply clergy list, please contact the Canon to the Ordinary.

ELCA clergy may be considered for license, if requested by a head of congregation. Such clergy must present, in addition to the standard licensing requirements, a letter from their Bishop approving the license application. If they are not residing in their home synod, they must also have approval from the Lutheran Bishop in whose synod they reside. Please request the application for ELCA clergy license from the Executive Assistant to the Bishop.

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

Clergy who assist in congregations, including assistants, associates, curates, and non-staff assisting clergy, owe a duty of loyalty to the head of congregation, at whose pleasure they serve. In the course of ministry, they are to support the ministry, programs and administration of the rector/vicar.

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

- All clergy serving in the Diocese of Alabama may contact the Bishop to discuss any concern related to their ministry.
- Most problems can and should be solved in discussion with the clergy

person's immediate supervisor, and clergy are encouraged to utilize this as a first step. However, clergy may also discuss issues or concerns with the rector, if that is the next level of management.

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

Business Expenses

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

Bishop Visitation

All questions regarding episcopal visitations are to be directed to the Bishop's Executive Assistant. In order to facilitate a Bishop's visit to the congregation the following information is offered.

Liturgical Readings and Colors

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

Bishop's Chaplain

If possible, a child or youth shall be designated as the Bishop's chaplain.

Order of Service

Please send an advance copy of the Order of Service (even if only a draft) to the visiting Bishop and the Bishop's executive assistant at least one week prior to the scheduled visit.

Bishop's Customary, Visitation, and Confirmation Record Form

These forms should be sent three weeks, or as soon as practical, in advance of a Bishop's visitation. For information about the forms or other questions, please contact the Bishop's Executive Assistant.

Expectations Regarding Bishops Visiting from Outside the Diocese

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

Clergy Compensation and Benefits

Medical Insurance

Resolution A177 of the General Convention states that employers are required to provide all eligible clergy and lay employee with equal access to and parity of funding for healthcare benefits to be provided through the Medical Trust. An eligible employee is someone who is scheduled for at least 1000 hours of compensated work annually for any domestic diocese, parish, mission, or other ecclesiastical body subject to the authority of the church. Parity refers to the requirement that employer cost-sharing must be the same for all eligible clergy and lay employees at 1500 hours a year.

Social Security Tax Reimbursement

Social security taxes for clergy are not handled in the same way as lay employees. Clergy are considered self-employed for calculation and payment of social security or FICA taxes (SECA). Please note that this same status does not apply in reporting compensation for calculation of income tax. Most clergy are employees for purposes of reporting compensation for calculation of income tax and should receive a W-2. However, clergy status for social security tax (FICA) is the same as a self-employed person. This means that clergy pay the full tax (employee and employer share). Parishes may pay a portion of the tax for clergy through additional compensation. Such payments are taxable income and must be reported as income on the clergy W-2. There are no exceptions to this rule. If a parish chooses to pay a portion of the clergy social security tax this amounts to an increase in compensation and must be reported as such.

Pension

Pension assessments shall be paid on compensation to the Church Pension Fund. The assessment is 18% of compensation. The Pension Base is defined as the total cash salary, utilities, and housing allowance. In parishes with a rectory, a value for the housing provided is included in the calculation of the pension assessment. The value of housing provided in parishes providing a rectory for purposes of computing the pension assessment is 30% of the stipend and utilities.

Health Insurance

Clergy scheduled to work 1000 or more hours a year are eligible for medical insurance through the Episcopal Medical Trust. Cost sharing between the employer and employee is mandatory for those scheduled to work 1500 or more hours a year. Please contact the Director of Human Resources with questions.

Vacation/Leave

The norm for full-time clergy is 23 days annually including 4 Sundays.

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

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

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

Short-Term/Long-Term Disability

Clergy active in the Clergy Pension Plan are provided Short-Term and Long-Term Disability through the Clergy Pension Fund. Short-Term Disability benefits will be paid for up to 24 weeks or until no longer disabled, if earlier. If disability is due to childbirth, short-term disability benefits will begin on the date of birth and will continue for 12 weeks. If one is disabled for more than 26 weeks, one may be eligible for benefits under the Long-term Disability Plan.

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

Letters of Agreement Provisions

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

- No restrictions are placed on how vacation is spent.
- Clergy Sabbatical: Sabbatical is defined as a period of at least three months away from a priest's primary employer for the purpose of enhancing his/her ministry by a period of study, travel, reflection, and rest. A sabbatical can be taken after the completion of five years of ordained ministry in a single ministry setting. The sabbatical will be

with full pay and allowances and may be taken in conjunction with annual vacation and continuing education time. Clergy are expected to return and serve at least one year following their sabbatical. Sabbaticals are not an earned benefit to be paid out upon resignation.

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

- Paid Vacation: diocesan policy designates paid vacation, including four Sundays, with the total number of days proportionate to the number of days contracted to work per year. No restrictions are placed on how vacation is spent.

- Continuing Education: diocesan policy designates seven days, including two Sundays, each year for continuing education pursuits, with full pay and allowances.

Vocational deacons must have provisions in their Letters of Agreement for the following:

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

Retired Clergy Active in Ministry

The Church Pension Group governs the salary retired clergy may earn. When clergy retire, they may serve in the Episcopal Church and continue to receive pension benefits as long as:

- They are in good standing with the Episcopal Church
- They will not be working in the church or institution from which they have retired
- Their total compensation from Episcopal Church-related income does not exceed $47,350 for any 12-month period, effective January 1, 2026.
- If they are age 72 or older, they may serve in the Episcopal Church with no restrictions on income.

All retired clergy active in ministry must meet the Bishop's expectations of clergy.

Supply Clergy Policy

In the absence of Rector/Vicar or Priest in Charge, the Senior Warden or Bishop's Warden is responsible for arranging supply clergy. A list of clergy who are available to supply and the current standard rates for hiring supply clergy are available from the Bishop's office. To be added to the Supply Clergy List, please direct requests to the Canon to the Ordinary.

Diocese of Alabama non-parochial clergy and licensed clergy are eligible to supply, provided they are in good standing with the Bishop and meet the Expectations of Clergy, including a background check and compliance with the required trainings as prescribed by the policy for Policy for the Protection of Children, Youth and Vulnerable Adults.

Interim Clergy

Please direct questions regarding interim ministry to the Canon to the Ordinary. Candidates for interim positions within the Diocese of Alabama are expected to meet the Bishop's Expectations of Clergy, regardless of canonical residence or active/retired status.

Travel and Business Expenses

Parishes may compensate or reimburse clergy and lay employee travel and business expenses in one of two ways:

Option 1: The Vestry may choose to provide a Travel and/or Business Expense Allowance.

- Payments must be included along with salary by the treasurer on the W-2 forms that are given to employees and filed with the IRS at the end of the year.
- Employees must report this allowance as income on Income Tax Form 1040.
- Employees may then enter actual travel and/or other business expenses as a miscellaneous deduction on Form 1040 – Schedule A.
- Employees must be prepared to provide to the IRS detailed documentation of travel and other deductions claimed.
- As a miscellaneous expense deduction, only the amount in excess of 2% of Adjusted Gross Income may be deducted for purposes of calculating income tax.

(This may result in the clergy or lay employee paying more income tax than could be the case under Option 2 below.)

Option 2: The Vestry may choose to set down in writing a plan for reimbursing a cleric or other employees for travel and other business expenses.

- Employees must substantiate to the treasurer all business expenses, detailing date, place, and business purpose of travel or other expense, and be reimbursed in the exact amount of the expenditure; or if employees receive an allowance or advance toward expenses, they must return to the parish any amount which cannot be substantiated as an expense.

- If travel and business expenses are handled under Option 2, business expense reimbursements are not reported on W-2 forms and need not be reported on employees' income tax returns.

Note that travel to and from the place of work to home, i.e. daily commute, is not a business expense. If reimbursed (not recommended) the amount must be included on the W-2 as taxable income.

Supply Clergy List

Depending upon their schedule, the clergy below are available to any church in the diocese:

Rev. Ben Alford
334-538-6049

Rev. John Bagby
205-977-0124
bagman8@bellsouth.net

Rev. Monica Carlson
205-352-5098
monicacrlsn@gmail.com

Rev. Marge Doyle
870-688-3773
celticmuse52@gmail.com

Rev. Rusty Goldsmith
205-873-3723
mauricegoldsmith@gmail.com

Rev. Amy Diller Guida
(ELCA Pastor in full communion with the Episcopal Church)
662-292-6185
pastoramydillerguida@gmail.com

The Rev. Mark Likos
205-470-3132

Rev. Virginia Monroe
vjmonroe@outlook.com
828-506-1422

Rev. Canon Rob Morpeth
rmorpeth@dioala.org
205 540-1554

Rev. Roy Pollina
royg@comcast.net

Rev. Clark Hubbard
hubcc@aol.com
912 659-0505

Rev. Susan Sloan
ssloanpr@icloud.com
256-503-7898

Rev. Dr. Robert Wyatt
robertowyatt@gmail.com
708-269-5473

Rev. Dr. Barry Vaughn
drjbarryvaughn@gmail.com
702-418-4557

Depending upon their schedule, the <u>deacons</u> below are available to lead Morning Prayer and preach.

Rev. Marti Holmes
deaconmarti@gracechurchwoodlawn.org
205-567-6195

Rev. Dave Lambert
deacondave2016@gmail.com
205-914-5975

Rev. Judy Neil
judyiveyneil@gmail.com
205-305-7631

Rev. Jeannie Randall
jrann228@gmail.com
256-348-9918

The Venerable Catherine Schiesz, Archdeacon of the Diocese
cschiesz@dioala.org
205-542-1900

Depending upon their schedule these <u>licensed lay preachers</u> are available to preach and lead Morning Prayer.

Mr. Taylor Johnson, Seminarian
taylorfj85@gmail.com
903-407-3938

Ms. Bre Carter, Diocesan Missioner for Racial Healing
bcarter@dioala.org
256-763-1626

Ms. Madeleine Pearce, St. Matthias in Tuscaloosa
hpearce5626@charter.net
205-792-1969

Dr. Josh Vacik
jvacik@comcast.net
256-740-1255

Compensation for Supply Clergy

IRS rate of mileage reimbursement

Sunday One Service $200

Sunday Two Services $250

Weekday Service $100

Compensation for Seminarians and Lay Preachers

IRS rate of mileage reimbursement

Sunday One Service $150

Sunday Two Services $200

Weekday Service $100

Vesty Responsibility and Structure

The vestry has four (4) primary responsibilities. It serves as the legislative authority for the parish and shall transact all of the temporal business of the parish. The primary responsibilities are:

- Steward the parish finances.
- Care and maintain parish facilities.
- Choose parish leadership.
  -- Call a Rector
  -- Elect delegates to the Annual Diocesan Convention
  -- Establish parish committees/task forces
  -- Appoint representatives to parish school board and/or community boards.
- Assist the Rector in the proclamation of the gospel and building up the church.

The legal standing of a Parish Vestry is drawn from three sources: Constitution and Canons of the Episcopal Church, the Charter and Canons of the Diocese of Alabama, and parish customs and publish vestry policies.

Guidelines for Parish Covenants in the Diocese of Alabama

The guidelines establish a minimum level of proportional giving of 10% for parishes with annual operating income less than $150,000 and a minimum level for parishes with annual income greater than $150,000 of 15%. The standing resolution of the diocesan convention calls for this calculation to be based on the “unrestricted and undesignated income of each parish.”

The guidelines encourage parishes not currently funding the minimum to adopt a plan with regular increases to bring the parish to the minimum level in five years. Parishes that should consult with the Director of Finance and the Bishop when circumstances dictate that a significant reduction in a parish covenant must be made.

Diocesan Policy for the Borrowing of Funds by Parishes

The Canons of the Diocese of Alabama require involvement of the diocese whenever a parish contemplates borrowing an amount greater than 10% of the parish net disposable income or when property occupied by the parish must be pledged to secure the loan.

The required approval by the diocese is requested through the office of the Director of Finance and Administration. Parishes are expected to have a local attorney review all the documents on behalf of the parish and should develop a business plan as part of their preparation for the approval process. The legal and financial documents must then be presented for review prior to action by the diocese. Documents should include written authorization of the intended indebtedness from the parish vestry and rector. The closing date for loans should be coordinated closely with the Finance Director. Depending on the timing of the request in relation to the scheduled meetings of the groups which must give consent, action may take from 2 to 6 weeks. Key leadership from within the parish may be needed to attend one or more meetings to review the request.

In the case of a secured loan involving property occupied by the principal parish buildings, the approval of the Diocesan Council is also required. This approval is also requested through the office of the Deputy of Finance and Administration.

Note that when the loan is associated with construction or renovation of parish buildings, the Department of Architecture must approve conceptual drawings and the final plans prior to the issuance of final approval from the diocese. This process generally occurs well in advance of seeking final approval for the financial plan.

A careful review of the applicable diocesan canons is important. Canon 6, Section 6; Canon 7; and Canon 9, Section 6 are applicable. Awareness of Article III of the Charter of the Diocese is also recommended. These documents can be found in the back of the Diocesan Directory and Journal and on the Diocesan web site

Clergy Transitions/Search Processes

Please direct all questions regarding clergy transition to the Canon to the Ordinary. The Canon to the Ordinary is available to assist clergy in transition within and without the Diocese of Alabama.

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

Clergy may be placed only with the approval of the Diocesan Bishop.

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

The Diocesan Bishop determines eligibility for transition ministry in the Diocese of Alabama. It is based upon the clergy's qualifications. It is also dependent upon meeting the Expectations of Clergy. All clergy in good standing may seek positions outside the Diocese. Clergy are encouraged to communicate their intentions to seek positions outside the Diocese to the Canon to the Ordinary.

Staff Clergy Searches

- Rectors who would like to call clergy to join their congregational staffs from within or without the Diocese must consult the Bishop, through the Canon to the Ordinary, before they initiate conversations with clergy, and are expected, out of courtesy, to inform the potential candidate's rector of the intention to pursue the rector's staff member.

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

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

Deacons/Curates

- The Bishop of Alabama makes all ministry assignments for deacons and newly ordained priests.

- A rector may not recruit or hire a seminarian, deacon, or priest without the Bishop's permission.
- The Bishop must give approval for a rector to consider recruiting or hiring a curate or deacon from outside the Diocese of Alabama. A curate or deacon is required to release a full canonical file. For assistance, contact the Canon for Vocation.

Ordination Process

Discernment for Ordination

Our discernment process follows the requirements outlined in Title III of the Constitution and Canons of the Episcopal Church. For a detailed breakdown of our specific process for discernment, please consult the relevant pages on our diocesan website.

Expectation of Clergy Within the Diocese Regarding Discernment

The raising up of ordained leaders within the church is a stated expectation of all clergy within the diocese, but especially anyone who serves as Rector or Priest-in-Charge of a parish. We expect that our clergy will be proactive in prayerfully identifying those fit for possible ordained ministry within the church and will be dedicated in engaging with these individuals in parish-level discernment.

Qualities of Someone in Discernment

We expect that someone in discernment will be a faithful follower of Jesus with demonstrated spiritual leadership at the parish level. Individuals in discernment should be willing to learn and grow through the process. Clarity of one's vocation is the goal of successful diocesan discernment, not necessarily ordination. Those who discern a call to Holy Orders must be willing to relocate for their formation and eventual ministry within the church, and they must be willing to undertake financial responsibility for their studies in addition to any support provided by the Diocese.

The Commission on Ministry

The Commission on Ministry (COM) is an appointed body that serves as an advisory council to the Bishop regarding matters of discernment and formation for those seeking ordination in the Episcopal Church through the Diocese of Alabama. The duties and composition of the COM is governed by Title III of the Constitution and Canons of the Episcopal Church. As stated in the Canons, the COM serves as a resource for all the baptized in aiding in discernment for ministry.

Ordination Process to the Diaconate

The tradition of the early Church informs us that diaconal ministry is not only necessary to the life of the Church, but also that it serves to call forth and empower the servant ministry entrusted to each of us by Christ. They serve as bridges connecting the Church and the world at a point of need and inviting all the baptized to travel the bridge. While this particular form of leadership is rooted in baptismal ministry, it is not the call of all the baptized, and it is distinct from priestly and episcopal ministry.

What qualifications are necessary for one to live out the vocation of a permanent deacon in the Episcopal Church and in the Diocese of Alabama?

First, a person identified with having a vocation to the diaconate would be recognized by himself or herself and by the Church as meeting three fundamental requirements:

- the exercise of a servant ministry in the world.
- the desire and capacity to nurture a life of service in the name of Christ.
- the desire and capacity to connect deeply with the local community and connect the church with that community.

Second, a person with a discernible vocation evidences the following qualities:

- a strong commitment to and deep love for Jesus Christ and the Church.
- an ability to articulate his or her faith.
- a confirmed adult member in good standing
- a spiritual life marked by worship, prayer and the study of scripture.
- a vocation to serve and enable others to serve.
- care and concern for the marginalized.
- a history of satisfactory employment and strong interpersonal skills.
- a willingness to undertake extensive preparation, including theological education, spiritual formation, and practice of ministry.

Norms of Service for the Diaconate

The following general and liturgical norms shall serve as the basis for the establishment and direction of the diaconate ministry in the Diocese of Alabama.

Communication between Deacon and Bishops/Annual Report

Communications between the Bishop and each deacon is very important. The Bishop may initiate contact with a deacon at any time. Deacons are also free to contact the Bishop at any time. Deacons should initiate one personal meeting the Bishop on an annual basis to discuss ministry and other issues as necessary. The deacon will write an annual report to the Bishop before the appointment as preparation for the conversation. Additionally, the deacons and the Bishop will meet annually on retreat to pray for and share about their ministry together. The Office of the Bishop will schedule and plan the retreat.

Employment and Church Pension Fund Eligibility

The norm for this order will be non-stipendiary ministry. Therefore, deacons are exempt from assessments for and ineligible for the benefits of the Church Pension Fund, unless (with the approval of the Bishop) employed directly by a parish or other church institution.

Participation in Clergy Gatherings

Deacons are expected to attend Clericus Gatherings and the Annual Clergy Conference and other gatherings of the clergy of the diocese.

Professional Education

Deacons are encouraged to participate in annual programs of continuing education. The parish in which a deacon serves is expected to help fund such education.

References to the Order of Deacons

The deacon is to be referred to as “Deacon” rather than “vocational” or “permanent deacon.” A deacon in the process to ordination should be referred to as a “transitional deacon.” This should be the normal usage in all diocesan and parish documents. These norms pertain to “deacons” and not “transitional deacons.”

Role in Parishes in Leadership Transition

Deacons do not normally serve as interim clergy in charge in parishes involved in a search process, unless so directed by the Bishop for some pastoral reason. A deacon may also be assigned by the Bishop to serve in a parish during an interim period in some capacity other than the clergy person in charge.

Role of a New Rector

Within four months of the time that a new rector begins work at a parish, a new letter of agreement shall be entered into and signed by the Diocesan Bishop, the rector and the deacon. After consultation with the Diocesan Bishop, the deacon may be transferred or asked to take a temporary leave from the parish. The conditions of such a transfer or leave shall be determined by the Diocesan Bishop in consultation with the deacon and shall be in writing.

Titles and Form of Address

The normal and preferred title of address for a deacon will be "Deacon." In formal address a deacon will be referred to as "The Rev. Deacon."

Vestry Attendance

Deacons will be expected to attend vestry meetings of the parish to which they serve. They are not members of the vestry, nor do they have a vote in matters of the vestry.

Vocation to Priesthood

The diaconate is a complete clerical order, distinct from priesthood and not transitional to it. Thus, any deacon who comes to the belief that his or her proper vocation is to the priesthood, that deacon will enter the ordination process for that order at the beginning of that process. All requirements of the process for discernment for priesthood need to be met.

Liturgical Norms

The premise for these liturgical norms are articulated in the *Book of Common Prayer*:

> "The leader of worship in a Christian assembly is normally a bishop or priest. Deacons by virtue of their order do not exercise a presiding function: but, like lay persons, may officiate at the Liturgy of the Word, whether in the form provided in the Daily Offices, or (when a bishop or priest is not present) in the form appointed at the Eucharist. Under exceptional circumstances, when the services of a priest cannot be obtained, the bishop may, at discretion, authorize a deacon to preside at other rites also, subject to the limitations described in the directions for each service." (*Book of Common Prayer*, page 13)

- A deacon may preside at the Burial of the Dead when the services of a priest cannot be obtained. The Eucharist should be omitted as well as the blessing of the people. Deacons do not bless or consecrate graves.
- Deacons may publicly officiate in church or at any other Christian assembly, the Daily Offices of Morning and Evening Prayer, the Order of Service for Noonday, the Order of Worship for the Evening, and the Order for Compline.
- Deacons shall perform the full and proper liturgy of a deacon in the parish liturgies on Sunday, Christmas, Ash Wednesday, Maundy Thursday, Good Friday and the Easter Vigil. At the Easter Vigil, it is appropriate for the deacon to carry the Paschal Candle in procession and sing or say the Exsultet. Deacons may also carry the Paschal Candle in procession for baptisms and funerals.
- Deacons are not permitted to perform "deacon's Masses" (more properly described as the administration of the reserved sacrament in Church in the absence of a priest) unless there is an urgent need and the Bishop has given approval in each instance.
- Deacons are permitted to administer Baptism only in a genuine emergency. Such emergencies include those instances when a person is in extreme circumstances in a hospital or at the scene of an accident when no priest is readily available. (See pages 313-4 of the *BCP)*. A deacon may also, when the services of a priest cannot be obtained, and with the authorization of the Bishop, officiate at public baptism as part of the Easter Vigil service (See page 284 of the *BCP)*.
- The rubrics of the *Book of Common Prayer* are explicit about the functions of a deacon at a celebration of the Holy Eucharist.
    - Reading the Gospel – If present, a deacon reads the Gospel rather than a priest.
    - Prayers of the People – While it is customary in most congregations for a lay person to lead the Prayers of the People, a deacon may also lead these prayers.
    - Confession – If present, a deacon may invite the people to confession.
    - The Lord's Table/Altar **–** Deacons should serve at the Lord's Table, preparing and placing on it the offerings of bread and wine, and assisting in the ministration of the Sacrament to the people. When the celebrant is assisted by a deacon or another priest, it is the customary for the celebrant to administer the consecrated bread and the assistant the chalice. When several deacons or priests are present, some may administer the bread and others the wine.
    - Dismissal – At the conclusion of the service, the deacon dismisses the people.

- Taking Holy Communion to those in the parish who cannot be reasonably present at the Eucharist is a traditional role for deacons and deacons may do so at the request of the supervising priest. A deacon may lead the service of the Word in the service of Ministration to the Sick, but the deacon does not anoint the sick except in cases of extreme necessity and only when oil has previously been blessed by a Bishop or priest. Cases of necessity are understood to be genuine emergencies in a hospital or at the scene of an accident when there is no priest readily available. Deacons or lay persons do not anoint people at regularly scheduled healing services in a parish.

- Deacons do not preside at either a Celebration and Blessing of a Marriage or at the Blessing of a Civil Marriage. However, a deacon may deliver the charge, ask for the Declaration of Consent, read the Gospel and perform other diaconal functions at the Eucharist.
- The Reconciliation of a penitent is normally reserved to a Bishop or priest who alone can pronounce absolution. If a priest is not available and a deacon hears the confession of a penitent, he or she should follow the rubrics on page 446 of the *BCP* and must use the form of Declaration of Forgiveness found on page 452.

Guidelines for Eucharistic Ministers

1. The norm is no more than one Eucharistic Minister per 50 baptized members per parish. In the case of parishes with 150 baptized members or less, there may be five EM's appointed. These numbers are subject to negotiation if such additional assistance can be justified.

2. All licenses should be considered revoked when an EM changes parishes. Licenses of Eucharistic Ministers who move into the Diocese of Alabama from other dioceses will not be accepted.

3. Licenses for EMs will be issued for a period of three years and may, on the request of the rector, be renewed for another three years. *Regardless of the specific date on which the request is made, all licenses will be dated from the First Sunday of Advent until the Last Sunday after Pentecost of the appropriate year.* After serving for six consecutive years, however, an EM must relinquish that function for at least one full year before being licensed again.

4. The Bishop may, at his or her discretion, require Eucharistic Ministers (and such other lay persons as are licensed to perform liturgical and pastoral functions in this diocese) to attend training events sponsored by the diocese as a condition of licensing.

5. A person licensed as a Eucharistic Minister may also be licensed to serve as a Eucharistic Visitor and to take the sacrament consecrated at a principal celebration of the Holy Eucharist on Sundays or other major feast days---immediately following such celebration---to those members of the parish who, by reason of illness or infirmity, were unable to be present at the celebration. Rectors seeking such authorization for Eucharistic Visitors are to write the Bishop a letter which will include the following information:

    - A description of the teaching given to the congregation about the ministry of Eucharist Ministers and Eucharistic Visitors.
    - A justification of the need for this ministry in the particular congregation and giving specific data as to how the Eucharist Visitor is expected to be utilized.
    - For each Eucharistic Visitor so designated, a detailed account of that person's qualifications and training with specific attention to the basics of pastoral care. As this Eucharistic Visitor is often in delicate pastoral situations requiring sensitivity and preparation, each parish engaged in this particular ministry *must develop adequate liturgical and pastoral courses of preparation.*

6. It is the policy of the Bishop of Alabama to license no more than one such Eucharistic Visitor for every two hundred communicants per parish. Under no circumstances, however, would any parish have more than five Eucharistic Visitors so authorized.

7. Please note that this special license will be issued for the same term and may be renewed under the same conditions as the basic Eucharistic Minister's license. Such special license may be revoked before the expiration date without revoking the basic license.
8. In taking the Holy Eucharist to those unable to be present at the celebration, note the following guidelines:

- Appointments for such visitation should be made in advance. Eucharistic Visitors should not be vested while on such visits. It would be a good idea, however, to wear a name tag.
- Eucharistic Visitors will be given vessels containing the consecrated elements at the altar immediately following the communion of the people. They will depart from the church immediately and the celebrant may send them out with such words of commissioning as might be appropriate for the occasion. The persons to be visited should be remembered at that time (or previously in the Prayers of the People).
- The Eucharistic Visitors will use only that form entitled "Communion Under Special Circumstances" on page 396 of the BCP and must observe the appropriate limitations (and such other instructions as may be given by the rector). The Collect and Gospel of the Day should be incorporated.
- At the conclusion of the visitation(s), that Visitor is to consume reverently what remains of the consecrated elements and to cleanse the vessels and return them to the church at the first convenient opportunity. Under no circumstances is a Eucharist Visitor to retain consecrated elements as a "Reserved Sacrament."
- Such visits shall be properly recorded in the liturgical service register.

EUCHARISTIC MINISTER LICENSE REQUEST TO BISHOP OF ALABAMA

2006 edition, Canons of the Episcopal Church , Title III, Canon 4

Parish ______________________________ Location ________________________

Rector ______________________________

License(s) requested for:
Full name as appears on Parish register   Complete Home Address

___________________________________ ______________________________

___________________________________ ______________________________

___________________________________ ______________________________

Full name and term(s) of E.M.(s) currently licensed in Parish whose license expires:

_____________________________ _________________________

_____________________________ _________________________

Indicate by name Eucharistic Visitor(s) to be specifically licensed to take Sacrament out for visitations and enclose appropriate documents as per diocesan policy.

____

_____________________________ _____________________________

For all E.M.(s) Licensed as per Title III, Canon 4,
this form must be accompanied by the following:

1. A letter from the rector stating:

- **(a)** the need for E.M. assistance beyond priestly coverage;
- **(b)** designation of E.M.(s) by name:
- **(c)** certification that E.M.(s) have received training Title III, Canon 4 and Bishop's memo.

2. A letter containing the same information signed by the Senior Warden or Clerk of the vestry.

3. A letter from each person to be licensed as below:

> I hereby make application for licensing as an Eucharistic Minister and/or Eucharistic Visitor in The Episcopal Diocese of Alabama. I further state that I have been trained for the exercise of this ministry and that I have read the requirements and stipulations of 2003 Title III, Canon 4 of the General Canons.

Signed by applicant (Full name as on form) ___________________________________

Address: ____

Marriage Guidelines in the Diocese of Alabama

These Marriage Guidelines replace all previous guidelines or policies, including "Marriage Guidelines in the Diocese of Alabama" and "Guidelines for the Witnessing and Blessing of a Marriage of Same-Sex Couples in the Diocese of Alabama," as published on July 2, 2019.

Updated Marriage Guidelines

Considering the developments in The Episcopal Church and in secular law, the Diocese of Alabama will implement updated Marriage Guidelines (2025) that apply regardless of the gender of those being married. These Marriage Guidelines replace all previous guidelines or policies, including "Marriage Guidelines in the Diocese of Alabama" and "Guidelines for the Witnessing and Blessing of a Marriage of Same-Sex Couples in the Diocese of Alabama," as published on July 2, 2019.

Two understandings of marriage have now emerged in The Episcopal Church: marriage is a covenant between two people and marriage is a covenant between a man and a woman. We affirm that the people who hold either position, whether they are the majority or minority in their context, are indispensable for our common life.

Commitment to our common life together shaped our previous guidelines on marriage of same-gender couples. Those guidelines provided a framework for communities to pray, learn, and embrace new liturgies and theological understandings, while also allowing other communities to bear witness to their conscientiously held beliefs. We continue to believe that building consensus on how the community understands marriage is the best practice for clergy and congregations.

The revision of diocesan marriage guidelines does not require any parish to change their current practices. No Member of the Clergy of this Church will be compelled or required to solemnize or bless any marriage. As in all things, all parties involved are to be treated with the Godly respect called for when Christ commanded us to love one another as he has loved us. No person should be denigrated or held in less esteem for holding conscientious convictions that differ on this matter from others in their parish or in this diocese.

1. **Guidelines for the Celebration and Blessing of Marriage**
   - Every Member of the Clergy in this Diocese shall conform to the laws of the State governing the creation of the civil status of marriage; the constitution and canons of The Episcopal Church; and the constitution, canons, and policies of the Diocese of Alabama.
   - Prior to the solemnization the Member of the Clergy, or a person known by the Member of the Clergy, should complete the instruction with the couple required by the canons.

- The Member of the Clergy may solemnize a marriage using any of the liturgical forms authorized by this Church.

2. Guidelines in the case of Remarriage

- In the case of remarriage, Members of the Clergy shall follow the canons of The Episcopal Church and the provisions made below:

    - Please allow the Bishop 30 days to respond to your petition for remarriage.
    - Before submitting a petition for remarriage, the Member of the Clergy should have sufficiently counseled with the couple to form an opinion of the planned marriage. Approval of the petition should not be the signal to begin the counseling process. No date for the marriage should be set prior to receiving consent.
    - If it is a third marriage for either party, it is required that they see a professional counselor at least two times and have a letter from the counselor sent to the Bishop with your request. This is helpful for anyone who has been divorced and plans to be remarried and required in the case of two divorces. It is very unlikely that the Bishop will be able to give approval for the remarriage in the church of a person who has been divorced three times or more.
    - Every parish is requested to publish, prominently display, or circulate our teachings and procedures on this subject at least once a year.
    - It is strongly recommended that you consider the use of the Sacrament of Reconciliation during your counseling process. This seems to be suitable means of helping a person deal with the scars of a failed marriage before a new one begins.
    - During pre-marital counseling, the content and implications of Canon I.19.1 should be forthrightly addressed.

3. Marriage Under Alabama Law

- The State of Alabama amended various sections of law related to marriage. After reviewing these amendments, our Chancellor advised that the 2019 law removed the requirement for a marriage to be solemnized by a ceremony performed by Member of the Clergy or other licensed official and removed the requirement for the Probate Judge to issue a marriage license. Under the 2019 law, parties are presumed married when the required documents are signed, notarized, and filed with the Probate Court within 30 days. No change was made concerning who has the right to marry.
- The Member of the Clergy is canonically required to determine that the parties have the right to marry according to the State law. This information should be obtained during the premarital counselling. The completion of the Alabama form provides confirmation that the parties can lawfully be married.

- The Chancellor offers the following best practice options:
    - Prior to the ceremony day, the couple may complete and file the required paperwork and then provide a file stamped copy to the Member of the Clergy. This ensures that all the civil legal requirements have been met prior to the ceremony in the church; OR
    - On the day of the ceremony, the couple completes the required paperwork in the presence of a notary. This may be done prior to or after the ceremony. The couple will then need to file this paperwork with the Probate Court and pay the required fees within 30 days.
- Both of the above options create the possibility that the couple will be civilly married prior to the church ceremony. If this is the case, unless the couple specifically requests the service be a Blessing of a Civil Marriage, the Member of the Clergy and couple should use one of the authorized rites for the celebration of a marriage.
- While a Member of the Clergy is no longer a part of the solemnization of the civil marriage, the sacramental rite of marriage, and the grace and blessing received by the couple, is not dependent on that secular function.

Background

The 77th General Convention of The Episcopal Church in 2012 authorized Liturgical Resources for Blessing Same-Sex Relationships and created a Task Force on the Study of Marriage to explore marriage and develop theological resources. In 2014, Bishop Kee Sloan created the Bishops' Commission on Generous Pastoral Response to consider the liturgies authorized and how to implement a process for Blessing Same Gendered Relationships in the Diocese of Alabama. After the guidelines were drafted, gatherings were held around the diocese to receive feedback. The guidelines became effective on the First Sunday of Advent, November 29, 2015. These guidelines required permission from the Diocesan Bishop to use the authorized liturgies. To receive permission, the rector needed the affirmative agreement of the vestry after informed deliberation and prayerful discernment. The guidelines also required clergy to receive permission for each couple, regardless of remarriage status.

On June 26, 2015, the U.S. Supreme court ruled in *Obergefell v. Hodges* that states must recognize same-sex marriages. At the 78th General Convention (2015) of The Episcopal Church, Canon I.18 concerning Marriage was amended to remove the gender specific language "husband" and "wife" in favor of gender-neutral language. This convention also authorized continued use of liturgies first considered at the 77th General Convention and authorized additional liturgies.

The 79th General Convention (2018) continued the trial use of gender-neutral liturgies. Resolution 2018-B012 resolved that "under the canonical direction of the Rector or Member of the Clergy in charge and where permitted to do so by civil law, provision will be made for all couples desiring to use these marriage liturgies in their local congregation or worshipping community, provided that nothing in this Resolve narrows the authority of the Rector or Priest-in-Charge." In July 2019, Bishop Sloan encouraged the continued use of the 2015 Guidelines for the Witnessing and Blessing of a Marriage of Same-Sex Couples as a best practice for our diocese.

The 81st General Convention (2024) authorized for trial use under Article X.b amendments updating to gender neutral language "An Outline of the Faith commonly called the Catechism" in the "What is Holy Matrimony" section. (2024-A160) The 81st General Convention authorized (first reading) for trial use under Article X.b revisions to the Book of Common Prayer 1979 that would make revisions to the prayer book language and add the gender neutral liturgies to the prayer book. (2024-A116) This is a first reading and requires a second reading and adoption at the 82nd General Convention.

The 81st General Convention also authorized revisions to Canon III.1 to state that no person (lay or ordained) should be denied access to discernment process, or to any process for employment, licensing, calling, deployment, clergy licensure or canonical residence "because of their conscientiously-held theological belief that marriage is a covenant between a man and a woman, or that marriage is a covenant between two people." (2024-A092)

Available Liturgies

- Book of Common Prayer 1979
    - Celebration and Blessing of a Marriage (pp. 423-432)
    - The Blessing of a Civil Marriage (pp. 433-434)
    - An Order for Marriage (pp. 435-436)
- Other available liturgies (published in Liturgical Resources 2)
    - The Witnessing and Blessing of a Marriage (alternative liturgy pursuant to Article X.c and requires approval of ecclesiastical authority [2024-D035])
    - The Celebration and Blessing of a Marriage 2 (trial use pursuant to 2024-A116)
    - The Blessing of a Civil Marriage 2 (trial use pursuant to 2024-A116)
    - An Order for Marriage 2 (trial use pursuant to 2024-A116)

Requirements for Petition for Remarriage

A letter from the cleric, who will be solemnizing the vows, stating the facts regarding the first marriage should contain the following information:

1. The date of the divorce decree along with the name and location of the court that issued the decree. (The Bishop expects you to have seen a copy of this decree, but please do not send your copy to the Bishop's office). If the divorced person was separated from the spouse or was living outside of the household before the divorce was granted and

you believe that information is pertinent, please so indicate. Except in rare circumstances, a period of not less than 1 year from the date of the final decree should have elapsed before remarriage will be permitted.

2. Specific name and location of the church to which each of the betrothed belongs. Indicate their status as to whether or not they are baptized, confirmed, and active or inactive. If they are communicants of another parish within The Episcopal Church, indicate that you have received the consent of that priest.

3. The status and disposition of children, if any, from the former marriage. If either member of the betrothed couple does not have custody of his or her children, please indicate what responsibilities he or she might have towards those children and whether or not such responsibilities are current (child support, etc.).

   - Your evaluation as to why the former marriage failed.

   - Your strong recommendations concerning the proposed marriage.

   - A signed copy of the Declaration of Intention should be included with your letter. This copy will not be returned.

   - Assuming consent is given, please indicate to the Bishop by letter the date and place of the service after the marriage has been solemnized. Make sure the service is properly entered in your parish register.

   - It is within your discretion to refuse to solemnize any marriage. It is likewise within the discretion of the Bishop to refuse consent.

These guidelines are applicable only to members of The Episcopal Church. If neither party is a member, the application will be received only if at least one of them has indicated a clear intention to be confirmed or received no later than the next confirmation date set for your parish.

Clergy Marriage, Divorce and Remarriage

Clergy Marriage and Remarriage

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

Clergy Marriage

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

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

Clergy Divorce

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

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

Addiction and Gambling Policies

Addiction Policy

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

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

Gambling Policy

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

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

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

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

Any cleric experiencing loss of control around gambling or shows signs of addiction should contact the Bishop for pastoral guidance and care.

Drug and Alcohol Policy

The Episcopal Diocese of Alabama is firmly committed to the health and safety of our employees, clergy and parishioners. The Diocese considers the influence of illegal drugs in the workplace to be detrimental to employees and to our mission and ministry. We expect that all parishes and related entities will abide by all applicable federal, state and local laws should be obeyed, including those governing the serving of alcoholic beverages to minors. Alcoholic beverages and food containing alcohol must be clearly labeled as such. Whenever alcohol is served, non-alcoholic alternatives must always be offered with equal attractiveness and accessibility. The serving of alcoholic beverages at church events should not be publicized as an attraction of the event. The group or organization sponsoring the activity or event at which alcoholic beverages are served must have permission from the parish for such a plan. The group or organization must also assume responsibility for those persons who might become intoxicated and must provide alternative transportation for anyone whose capacity to drive may be thus impaired.

Parish Administration

Finance and business administration matters are handled through the Office of the Director of Finance, Connie Bryson, cbryson@dioala.org.

Clergy Pension

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

Health Insurance

The Director of Human Resource administers health insurance in the diocesan office and can be contacted with questions or help in understanding benefits.

Property Insurance

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

Nave/Sanctuary Rental

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

Treasurers

It is suggested that all church treasurers submit to a background check. All church-plant and mission treasurers are required to submit to a background check. Requests for background checks shall be made to the Director of Human Resources. The cost of the background check is expected to be covered by the congregation; however, if it is a hardship, they may request financial assistance from the diocese.

Audits

Every congregation and institution must have an annual audit. A parish audit committee of individuals from the congregation may be authorized to perform the annual review of the financial records of any congregation or institution. However, an outside review of financial controls should be done at least every three years. The Director of Finance is available to assist with questions about audits.

Parochial Report

Each church is required to file the report online. The diocesan staff can access the report after a church has marked it as complete. The diocesan office does not require submission of a hard copy.

Discretionary Funds

Authority

Discretionary funds shall be deposited with the clergyperson in charge of the parish or mission or with such church officer as shall be appointed by the clergyperson. These funds are for pious and charitable purposes. During a vacancy, the vestry shall appoint a responsible person to serve as almoner.

Sources

The sources of discretionary funds vary. In some parishes, the loose offering at all services of the Holy Eucharist on a designated day is set aside for the rector's discretionary fund. Some congregations have trusts, the income from which is designed for the discretionary fund. Other congregations set aside a budgeted amount for the discretionary funds of the clergy in addition to the traditional sources or as a substitute for them.

Clergy

Some clergy place gifts received for weddings, funerals, and baptisms into the discretionary fund. Because of income tax considerations, it is recommended that clergy either adopt the practice of putting all such fees and gifts into the discretionary fund or none. It is improper to mingle personal funds of any kind with discretionary funds.

Records

Some congregations maintain the discretionary fund as a line item in the parish books, and the parish treasurer draws checks on vouchers signed by the clergy. This form of recordkeeping is the safest method of ensuring adequate records. When the clergyperson controls the checkbook of the discretionary fund, it is required that all contributions to the discretionary fund be made payable to the church, recorded in the books of the church, and then subsequently transferred by the treasurer to the discretionary fund.

Clergy who maintain their own checkbooks for discretionary funds are required to record the purpose of every check drawn on the account and the source of all deposits into it.

If a clergyperson receives a check payable to the church, with no other designation, the clergyperson is required to deposit it with the parish treasurer and receive vestry authorization before that money is deposited into the discretionary fund.

Uses

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

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

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

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

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

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

Accountability

The discretionary fund account is to be reviewed on a confidential basis, as part of the annual audit. Ideally, a representative of the firm doing an audit or a member of an audit committee would have a private conference with the priest. In other cases, it may be more practical for the Senior Warden or some other responsible member of the congregation to serve in this role.

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

Income Tax

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

Discretionary funds are to be maintained in bank accounts in the name of the congregation and carry the church's taxpayer identification number. An additional signatory, approved by the vestry, must be designated.

Neither the funds nor items purchased from the funds may be transferred to another cure with the rector and must remain with the congregation.

Architectural Process for a Parish Construction Project

The Design Review Process

The Department of Architecture is appointed annually by the Bishop. The Department includes members of the Church who are knowledgeable in the areas of architecture, engineering, law, construction, and liturgy. The Department meets as needed and notice of meeting dates is sent to those parishes or other agencies known to be considering major construction, decoration, or furnishing of facilities. Special meetings are scheduled, if necessary, to avoid delays. It is the intention of the Department to provide objective consultation that will enable parishes to build better and more cost-effective buildings within their financial means.

Key Review Points

1. **Review of the Written Architectural Program and Budget**
   This is a written statement, which describes the parish's mission and the architectural implications of that mission. It describes the functions parish buildings are intended to serve. It indicates how much money can be made available for the project. It states the design problem that an architect will be asked to address. This written document is to be completed by the parish before an architect is engaged.

   A copy of the Architectural Program and Budget is to be sent to the Finance Director for review by the Department of Architecture before any further consideration of building plans. A written review of the Architectural Program and budget will be sent to the parish for its consideration.

2. **Review of Schematic Drawings with the Parish Architect**

   Preliminary schematic drawings are to be sent to the Finance Director before the architect proceeds with detailed working drawings. This preliminary review is to include the site plan, floor plans, elevations, and a revised and updated project summary.

   A member of the Department of Architecture, who will prepare a written response, identifying specific architectural, financial, liturgical, and/or functions issues will review these materials. This review will be sent to the parish for consideration.

In addition to these two key points of contact in the review process, the Department stands ready to respond to specific requests for guidance in relation to initial exploration of conceptual alternatives, selection of and contracting with an architect, preparation of contract documents, parish-contractor agreements, and contract modifications.

Conflicts of Interest Policy

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

Section 1 - Purpose
The purpose of the conflicts of interest policy is to protect the corporation's [if your congregation, school, or other entity is not incorporated, substitute the name of the entity] interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the corporation or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflicts of interest applicable to nonprofit and charitable organizations.

Section 2 - Definitions:

- Interested Person: any director, principal officer, or member of a committee with board-delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.
- Financial Interest: a person has a financial interest if the person has, directly or indirectly, through business, investment or family:
    i. an ownership or investment interest in any entity with which the corporation has a transaction or arrangement,
    ii. a compensation arrangement with the corporation or with any entity or individual with which the corporation has a transaction or arrangement, or
    iii. a potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the corporation is negotiating a transaction or arrangement.
    iv. Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the board or appropriate committee decides that a conflict of interest exists.

Section 3 - Procedures:

a. Duty to Disclose: in connection with any actual or possible conflicts of interest, an interested person must disclose the existence of his or her financial interest and must be given the opportunity to disclose all material facts to the directors and members of committees with board-delegated powers considering the proposed transaction or arrangement.
b. Determining Whether a Conflict of Interest Exists: after disclosure of the

financial interest and all material facts, and after any discussion with the interested person, the interested person shall leave the board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

c. Procedures for Addressing the Conflict of Interest:

   a. An interested person may make a presentation at the board or committee meeting, but after such presentation, such person shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.
   b. The board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the corporation's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination, it shall make its decision as to whether to enter into the transaction or arrangement.

d. Violations of the Conflicts of Interest Policy:

   i. If the board or committee has reasonable cause to believe that a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
   ii. If, after hearing the response of the member and making such further investigation as may be warranted in the circumstances, the board or committee determines that the member has in fact failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Section 4 - Records of Proceedings:

The minutes of the board and all committees with board-delegated powers shall contain: the names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the board's or committee's decision as to whether a conflict of interest in fact existed; and the names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection therewith.

Section 5 - Compensation Committees:

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

Section 6 - Annual Statements: Each director, principal officer, and member of a committee with board-delegated powers shall annually sign a statement affirming that such person:

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

Section 7 - Periodic Reviews:

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

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

Section 8 - Use of Outside Experts: In conducting the periodic reviews provided for in Section 7, the corporation may, but need not, use outside advisors. If outside experts are used their use shall not relieve the board of its responsibility for ensuring that periodic reviews are conducted.