

ANGLICAN DIOCESE OF THE GREAT LAKES

2020 Congregational Handbook



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Definition of Certain Terms According to Canons and Custom

The Anglican Diocese of the Great Lakes is a diocese within the Anglican Church in North America and submits to the Constitution and Canons of that Church. The following are definitions consistent with the ACNA and ADGL canons.

ACNA - The Anglican Church in North America

ADGL - Anglican Diocese of the Great Lakes

ASA - The Average Sunday Attendance of a congregation for the previous calendar year.

Congregation – A gathered group of Christians who have organized and function in accordance with the canons of this Church attached to a diocese and under the oversight of a Bishop. Every congregation of the Church belongs to the Church by union with a Diocese of the Church

A congregation of this Church is a gathering where “the pure Word of God is preached and the sacraments are duly administered according to Christ’s ordinance.”

Congregations in the ADGL are of three types: Parishes, Missions, and Fellowships.

“A congregation must have a minimum average Sunday attendance of twelve (12) and financially contribute to the support of the mission of the Diocese, as well as send delegate (s) to the annual Synod in order to retain canonical status within the Diocese.”
(ADGL Canons, Title II, Canon 18, Section 1.)

Church – The Anglican Church in North America.

Diocese – The Anglican Diocese of the Great Lakes. (ADGL)

Fellowship – A congregation with an ASA of less than 12 persons with a stated commitment to grow into a Mission or Parish within the Diocese.

Governing Documents – Documents prescribing the organization, structure and governance of a congregation, including but not limited to Articles of Organization and by-laws. The governing documents of each congregation shall expressly provide that the congregation adopts, and recognizes the authority of, the Constitution and Canons of the Anglican Church of North America and the Constitution and Canons of the Diocese of the Great Lakes.

Governing Board – The body, including a Vestry or Mission Council, charged with responsibility for the temporal affairs of a congregation. *“Only confirmed members (or those desirous thereof) shall be eligible to serve on a vestry.”* (ADGL Canon, Title II, Canon 18, Section 4.)

Parish – *“In order to maintain parish status, a congregation must be self-supporting with a full time presbyter.”* (ADGL Canons, Title II, Canon 18, Section 2.)

“The rector and the vestry shall be the governing body of the parish.” (ADGL Title II, Canon 19 Section1)

Pastor – Refers to the priest, deacon or licensed lay pastor charged with the spiritual care of a congregation pursuant to ADGL and ACNA Canons.

Mission – A congregation which is not self-supporting with “part-time clergy.”

“The Bishop shall be the governing authority of a mission, except as he may delegate such authority. A mission may have a mission council to assist in the administration of its affairs approved by the Bishop. The vicar of a mission, appointed as such by the Bishop, shall be in charge of the mission, subject to the authority of the Bishop, and shall preside over all meetings of the mission council.” (ADGL Canons, Title II, Canon 19, Section 2.)

Mission Council – Governing board of a mission nominated by a congregation and appointed by the Bishop.

“Every person chosen to be a vestry or mission council member shall sign, in a book kept for that purpose, the following declaration and promise: “I do believe the Holy Scriptures of the Old and New Testament to be the Word of God and to contain all things necessary for salvation and I do yield my hearty consent to the doctrines, discipline and worship of the Anglican Church in North America. I promise that I will faithfully execute the office of vestry (or mission council) member of this Church to the best of my ability.” It is appropriate that the newly elected vestry or mission council members take and sign said oath before the congregation on a Sunday forthwith.” ((ADGL Canons, Title II, Canon 19, Section 6.)

Self-sustaining congregation – (By custom) A congregation generally meets the requirement of sustainability when it: (i) employs a Pastor, who is under the authority of the Bishop, at least half time; (ii) has an ASA of at least 50 persons; (iii) conducts weekly worship in a public space in accordance with the doctrine and forms of worship, including Texts for Common Prayer, which comply with the Constitution and Canons of the ACNA; and (iv) has a demonstrated ability to fund its own operations without the support of the Diocese or another congregation.

Synod – the governing body of the Anglican Diocese of the Great Lakes composed of clergy and lay representatives from each congregation as determined by the canons of the ADGL.

Vestry – Governing board of a parish elected by the congregation.

“Every person chosen to be a vestry or mission council member shall sign, in a book kept for that purpose, the following declaration and promise: “I do believe the Holy Scriptures of the Old and New Testament to be the Word of God and to contain all

things necessary for salvation and I do yield my hearty consent to the doctrines, discipline and worship of the Anglican Church in North America. I promise that I will faithfully execute the office of vestry (or mission council) member of this Church to the best of my ability." It is appropriate that the newly elected vestry or mission council members take and sign said oath before the congregation on a Sunday forthwith."
(ADGL Canons, Title II, Canon 19, Section 6.)

Basic Criteria for Vestry/Leadership Team Nomination:

1. Does the nominee meet or exceed the canonical requirements of communicant status in this church?
2. Is the nominee a consistent, concerned steward? Does he/she tithe or diligently work toward a full tithe each year and pay that tithe to the parish?
3. Does the basic lifestyle of the nominee conform to Christian expectations? Is it consistent with his/her evaluation by the community and parish? Does the nominee subscribe to the whole of the Jerusalem Declaration?
4. What lay ministry has the nominee performed?
5. Is the nominee hopeful about the parish's life, the Christian faith, and life in general?
6. Can the rector work with the nominee?

Vicar – Priest called by the Bishop to lead a mission.

Anglicanism



The Anglican Communion is the worldwide fellowship of churches owing their origins to the Church of England; it is the third largest church in the world. It is a fellowship within the one, holy, catholic (universal) and apostolic church. The Anglican diocese of the Great Lakes is a member of the Province of the Anglican Church in North America (ACNA).

1. ANGLICAN ETHOS

The Anglican ethos has often been described in the Latin phrase, *via media* (middle way). The desire of the early Anglican reformers was to stay true to the ancient traditions of the early church but in a way that was accessible and relevant to the people of 16th century England.

So right at the heart of Anglican Christianity is a desire to be simultaneously rooted and relevant, ancient and modern, traditional and innovative. These dynamics give us a holy tension which keep us grounded in the historic Christian faith but also enable us to be innovative in how we seek to live out and share our faith with others. I love that the ADGL has church plants that are traditional and missional, and others that are millennial and expressing the historic Christian faith in contemporary ways. I love that the ADGL is giving birth to new expressions of monastic communities that are beginning to impact people throughout the United States and overseas. I love that we have churches that are traditional in their worship yet innovative in their social outreach. May we continue to nurture the holy tensions that keep us both rooted and moving forward for the sake of Christ and his kingdom.

2. ANGLICAN CORE BELIEFS

It is expected that all ADGL clergy will be thoroughly familiar and grounded in the following materials which are foundational for an orthodox understanding of the Christian faith and Anglican belief.

a) Creeds: Anglican Christianity is unified by its center, not by its boundaries. In particular, the three creeds of the church (the Apostles' Creed, Nicene Creed, and Athanasian Creed) constitute the core of Anglican belief. But what exactly is a creed? A creed is a brief statement of faith used to clarify doctrinal points and to distinguish truth from error. The word *creed* comes from the Latin word *credo*, meaning, "I believe." The Bible contains a number of creed-like passages (see Deuteronomy 6:4–9; 1 Corinthians 8:6; 15:3–4; 1 Timothy 3:16). The historic creeds offer us a concise summary of authentic Christian beliefs. They contain essential Christian doctrines (e.g., the divinity of Christ, the virgin birth, the Trinity). It is through our common faith in these essentials that the Anglican Church can unite with fellow Christians. Our creeds guard the faith but they do not limit the leading of the Holy Spirit. The common ground of faith established by the

creeds allows us to move forward together into the world to fulfill the mission of God. Because of their importance, the creeds fill the pages of the Book of Common Prayer and shape its prayers, liturgies, ceremonies, and catechism. In many ways, the creeds act as an anchor that provide a doctrinal foundation for Anglicans everywhere.

b) Book of Common Prayer: These holy tensions are embodied in the Book of Common Prayer (BCP). Originally written in 1549 by Thomas Cranmer, the BCP revolutionized the life and worship of the Church. Cranmer's BCP was a brilliant innovation that brought new life and meaning to the ancient worship traditions of the church, because, for the first time, they were simplified and written in the language of the people rather than in Latin. The BCP is thoroughly rooted in and infused with Scripture and reflects Cranmer's deep conviction in the transforming power of God's written word, expressed in ways that transcend time and culture.

c) The Thirty-Nine Articles of Religion: The Thirty-Nine Articles of Religion are among the finest statements of the faith produced during the Reformation and remain relevant for today's world. The Thirty-Nine Articles can be divided into four categories:

Articles I–VIII: The Catholic Articles: Articles 1-5 articulate the nature of God, manifest in the Holy Trinity. Articles 6-7 deal with Holy Scripture, while Article 8 discusses the essential Creeds.

Articles IX—XVIII: The Protestant and Reformed Articles: Articles 9–34, which deal with salvation (9–10), justification by faith (11–14), the Christian life (15–18), the church (19–22), the ministry (23–24), and the sacraments (25–31),

Articles XIX–XXXI: The Anglican Articles: Focuses on the public expression of faith – the institutional church, the councils of the church, worship, ministry, and sacramental theology.

Articles XXXII—XXXIX: Miscellaneous: These articles concern clerical celibacy, excommunication, traditions of the Church, and other issues not covered elsewhere.

d) Chicago-Lambeth Quadrilateral: Historically the four core beliefs that unite Anglicans are expressed in the Chicago-Lambeth Quadrilateral. They are:

1. The Holy Scriptures of the Old and New Testaments as "containing all things necessary to salvation," and as being the rule and ultimate standard of faith.
2. The Creeds (specifically the Apostles' and Nicene Creeds) as sufficient statements of Christian faith.
3. The two sacraments ordained by Christ himself – Baptism and Holy Communion.
4. The ministry of the historic episcopate (Greek New Testament word: episcopos = bishop, overseer). In other words, all Anglican churches are led by bishops.

e) The Jerusalem Declaration: The Jerusalem Declaration (2008) – This statement from the Global Anglican Future Conference in 2008 has become the theological basis for the Global Fellowship of Confessing Anglicans, of which the Anglican Church in North America is a part.

1. We rejoice in the gospel of God through which we have been saved by grace through faith in Jesus Christ by the power of the Holy Spirit. Because God first loved us, we love him and as believers bring forth fruits of love, ongoing repentance, lively hope and thanksgiving to God in all things.
2. We believe the Holy Scriptures of the Old and New Testaments to be the Word of God written and to contain all things necessary for salvation. The Bible is to be translated, read, preached, taught and obeyed in its plain and canonical sense, respectful of the church's historic and consensual reading.
3. We uphold the four Ecumenical Councils and the three historic Creeds as expressing the rule of faith of the one holy catholic and apostolic Church.
4. We uphold the Thirty-nine Articles as containing the true doctrine of the Church agreeing with God's Word and as authoritative for Anglicans today.
5. We gladly proclaim and submit to the unique and universal Lordship of Jesus Christ, the Son of God, humanity's only Saviour from sin, judgement and hell, who lived the life we could not live and died the death that we deserve. By his atoning death and glorious resurrection, he secured the redemption of all who come to him in repentance and faith.
6. We rejoice in our Anglican sacramental and liturgical heritage as an expression of the gospel, and we uphold the 1662 Book of Common Prayer as a true and authoritative standard of worship and prayer, to be translated and locally adapted for each culture.
7. We recognize that God has called and gifted bishops, priests and deacons in historic succession to equip all the people of God for their ministry in the world.
8. We uphold the classic Anglican Ordinal as an authoritative standard of clerical orders.
9. We acknowledge God's creation of humankind as male and female and the unchangeable standard of Christian marriage between one man and one woman as the proper place for sexual intimacy and the basis of the family. We repent of our failures to maintain this standard and call for a renewed commitment to lifelong fidelity in marriage and abstinence for those who are not married.

10. We gladly accept the Great Commission of the risen Lord to make disciples of all nations, to seek those who do not know Christ and to baptize, teach and bring new believers to maturity.
11. We are mindful of our responsibility to be good stewards of God's creation, to uphold and advocate justice in society, and to seek relief and empowerment of the poor and needy.
12. We are committed to the unity of all those who know and love Christ and to building authentic ecumenical relationships. We recognize the orders and jurisdiction of those Anglicans who uphold orthodox faith and practice, and we encourage them to join us in this declaration.
13. We celebrate the God-given diversity among us which enriches our global fellowship, and we acknowledge freedom in secondary matters. We pledge to work together to seek the mind of Christ on issues that divide us.
14. We reject the authority of those churches and leaders who have denied the orthodox faith in word or deed. We pray for them and call on them to repent and return to the Lord.
15. We rejoice at the prospect of Jesus' coming again in glory, and while we await this final event of history, we praise him for the way he builds up his church through his Spirit by miraculously changing lives.

f) To Be A Christian: An Anglican Catechism

Developed by the ACNA, this *catechism* (a text used for instruction of Christian disciples) is designed as a resource manual for the renewal of Anglican catechetical practice. It presents the essential building blocks of classic catechetical instruction: The Apostles' Creed, the Lord's Prayer, and the Ten Commandments (the Decalogue). To these is added an initial section especially intended for those with no prior knowledge of the Gospel. Each section is presented in the question-and-answer form that became standard in the sixteenth-century because of its proven effectiveness. Each section is also set out with its practical implications, together with biblical references.

3. ANGLICAN MINISTRY

The impact of the gospel has led on to the structure of the church.—Michael Ramsey

The church exists as the spiritual and living body of Christ. In 1 Corinthians 12:12–27 Paul portrays the corporate church like that of a human body. In Paul's metaphor, every part has an important role to play in the whole. The rest of the New Testament agrees with Paul's representation of the church as a living being. Nowhere in the New Testament do we find the word "church" referring to a building. In its earliest expression, the church stood for a group of

individuals who had come together in the name of Jesus Christ. The Greek word for church is *ecclesia*, which literally means “the called out ones.” You may ask, called out from what? The answer to this question is simple: the world. At the deepest level, the church is made up of individuals who are called out of a disordered world by God to live differently and be a part of God’s order, His family. Accordingly, people of all ages in all times who are true believers and followers of Christ have made up the church.

Like all healthy organisms, the church requires numerous systems and structures that work together to fulfill its intended purpose and ensure its overall health. Just as the physical body must have an organic structure to hold it together in order to enable growth and development, the body of Christ must have an organic structure that can do the same. In this way, Anglicanism embodies an organic and ordered faith that is locally, nationally, and globally connected as it embraces the historic threefold order of ordained ministry.

What is one of the main roles of those in ordained ministry? *“To train and equip the saints to do the work of ministry.”* (Ephesians 4:11) In the Kingdom of God everyone gets to play, everyone has an important role in the ministry of the church.

a. Lay Ministry

ACNA Canons, Article III: The Mission of the Province

1, *“The mission of the Province is to extend the Kingdom of God by so presenting Jesus Christ in the power of the Holy Spirit that people everywhere will come to put their trust in God through Him, know Him as Savior and serve Him as Lord in the fellowship of the Church. The chief agents of this mission to extend the Kingdom of God are the people of God.”*

2. *The work of the Province is to equip each member of the Province so that they may reconcile the world to Christ, plant new congregations, and make disciples of all nations; baptizing them in the name of the Father, and of the Son, and of the Holy Spirit, and teaching them to obey everything commanded by Jesus Christ.*

Who are ministers of the Gospel?

All who place their faith in Christ and are baptized are called to be ministers of the Gospel. As Paul proclaims in Ephesians 2:10. *“For we are God’s workmanship, created in Christ Jesus to do good works, which God prepared in advance for us to do.”*

How are we empowered for ministry in Christ’s Kingdom?

Through the gifts of the Holy Spirit. The ACNA Catechism: “To Be A Christian” emphasizes this:

Catechism Question:

83. What are the particular ministries of the Holy Spirit?

The Holy Spirit imparts life in all its forms throughout God's creation, unites believers to Jesus Christ, indwells each believer, convicts believers of sin, applies the saving work of Jesus to the believer's life, guides the Church into truth, fills and empowers believers through spiritual fruit and gifts given to the Church, and gives understanding of the Scripture which He inspired. (2 Peter 1:21; John 14:26; 15:26; 16:7-15)

87. What are the gifts of the Holy Spirit?

The manifold gifts of the Holy Spirit include faith, healing, miracles, prophecy, discernment of spirits, other languages, the interpretation of other languages, administration, service, encouragement, giving, leadership, mercy and others. The Spirit gives these to individuals as he wills. (Romans 12:6-8, 1 Corinthians 12:7-11; 27-31; Ephesians 4:7-10)

88. Why does the Holy Spirit give these gifts?

The Holy Spirit equips and empowers each believer for service in the worship of Jesus Christ, for the building up of his Church, and for witness and mission to the world. (Ephesians 4:12-16)

b. Ordained Ministry**What is the role of those called to Ordained Ministry?**

As Paul makes clear in Ephesians 4:11-13 the role of those called to ordained ministry is *"to prepare God's people to do the work of ministry, so that the body of Christ may be built up until we all reach unity in the faith and in the knowledge of the Son of God and become mature, attaining to the whole measure of the fullness of Christ."*

The phrase *"holy orders"* refers to the threefold order of ordained ministry that emerged early in the life of the church and continues today. The offices of bishop, priest, and deacon constitute this threefold order. The *"holy"* aspect of holy orders represents how these offices have been set apart for God's purpose, while the word *"order"* comes from the Latin word *ordo*, and designates an established order for ordination.

As with other historic Christian traditions, Anglicanism holds to the historic threefold order of the ordained ministry of bishops, priests, and deacons. Anglicans believe that bishops are the successors of the apostles and many Anglicans believe that Episcopal authority is derived through the laying on of hands by other bishops who trace their ordination back to the apostles. From the time of Augustine of Canterbury onward, Anglican bishops can trace their ordination back in an unbroken line. In the ordination process, only bishops may ordain new candidates into the ministry of holy orders.

The various versions of the Book of Common Prayer provide an ordinal, which is a service book with rites for ordination of bishops, priests, and deacons. The preface of the Ordinal for the Anglican Church in North America states,

“It is clearly evident to anyone who diligently reads both the Holy Scriptures and ancient Authors, that from the Apostles’ time these three Orders of ministry have existed in Christ’s church: bishops, priests, and deacons. From the earliest days of the church, these Offices were always held in such reverent estimation, that no one might presume to execute any of them, without being first called, tried, and examined, and ascertained to have such qualities as are requisite for the same.”

Catechism Question

122. What is ordination?

Through prayer and the laying on of the bishop’s hands, ordination consecrates, authorizes, and empowers persons called to serve Christ and his Church in the ministry of Word and Sacrament. (1 Timothy 1:5; 5:22; Acts 6:6)

123. What grace does God give in ordination?

In ordination, God confirms the gifts and calling of the candidates, conveys the gift of the Holy Spirit for the office and work of bishop, priest or deacon, and sets them apart to act on behalf of the Church and in the name of Christ.

124. What are the three ordained ministries in the Anglican Church?

The three orders are bishops, priests, and deacons.

125. What is the work of bishops?

The work of bishops is to represent and serve Christ and the Church as chief pastors, to lead in preaching and teaching the faith and in shepherding the faithful, to guard the faith, unity, and discipline of the Church, and to bless, confirm and ordain, thus following in the tradition of the Apostles. (Titus 1:7-9; 1 Timothy 3:1-7; Acts 20:28)

126. What is the work of priests?

The work of priests, serving Christ under their bishops, is to nurture congregations through the full ministry of the Word preached and Sacraments rightly administered, and to pronounce absolution and blessing in God’s name. (Titus 1:5; 1 Peter 5:1)

127. What is the work of deacons?

The work of deacons, serving Christ under their bishops, is to assist priests in public worship, instruct both young and old in the catechism, and care for those in need. (Acts 6:1-6; 1 Timothy 3:8-13)

4. GEOGRAPHIC ORGANIZATION OF THE CHURCH

Dr. Winfield Bevins in his book “Simply Anglican” offers these reflections on the institutional structure of the Anglican Church:

The Local Church

For Anglicans around the world, the local church stands as the primary place of belonging and living out the Christian faith. According to the constitution and canons of the Anglican Church in North America, “The fundamental agency of the mission of the church to extend the Kingdom of God is the local congregation. The chief agents of this mission are the people of God.” By coming together as a congregation, the people of the local church form an extension of the global body of Christ. But how does this happen? Article XIX of the Thirty-Nine Articles of Religion reveals how this becomes a reality: “[a congregation is] a gathering where the pure Word of God is preached and the sacraments are duly administered according to Christ’s ordinance.” For Anglicans, the local church is where we grow in our faith together by hearing the Word of God preached, by partaking in the sacraments, and by being sent out in mission.

While the elements of Word and sacrament form the foundation of practice, local Anglican churches (often called “parishes”) fit within the organizational structure of the larger Anglican church by organizing and connecting to a diocese and submitting themselves under the oversight of a bishop. Local Anglican churches are presided over by a priest who provides the congregation with spiritual and sacramental leadership. In addition, each local church is governed by a local board known as the mission council or vestry, which is a group of women and men who are elected by the congregation to handle the temporal everyday affairs of the church. From the smallest parish to the largest diocese, the Anglican Church represents a diverse, but unified body of believers connected by a common faith and tradition.

Diocese

In addition to the role of ordained ministry and the local church, Anglicans are a part of a larger structure that holds them together in geographic regions around the world. Each Anglican congregation holds a place of membership within a local diocese. The word “diocese” comes from the time of the Roman Empire, which was divided into twelve different administrative and governmental dioceses. As the church grew so did the need to create an organizational structure. The early church borrowed from the Roman governmental structure to organize local clusters of churches in a region.”

Today, a diocese is a cluster of churches in a distinct geographic region under the leadership of a bishop. Some dioceses, like the Anglican Diocese of the Great Lakes, are made up of churches in a broad area, while others are comprised of a larger number of churches within a city, like the Diocese of London. At times, there are also non-geographic dioceses that are more affinity-based in nature, such as Churches for the Sake of Others (C4SO), led by Bishop Todd Hunter who oversees churches across the United States.

Province

Each diocese is a part of a national province led by an archbishop, the most senior bishop of a province. Like a diocese, the word “province” comes from the ancient Roman word “provincial,” which was the major territorial and administrative unit of the Roman Empire’s territories outside of Italy. A province is a larger geographic grouping of dioceses usually representing a nation, like the Anglican Church of Uganda. The minimum to constitute a province is usually four dioceses. Some provinces have distinct boundaries of political states, while some include multiple nations like the Anglican Church of South America (Argentina, Bolivia, Chile, Paraguay, Peru, and Uruguay). Worldwide, Anglicanism has more than eighty million members in thirty-eight provinces.

Together, each province makes up the worldwide Anglican Communion, which is a global family of autonomous national provinces in a reciprocal relationship with one another. Perhaps the greatest strength of the Anglican Communion is the way in which each province works together for the greater good of the communion, despite significant disagreements on certain issues. Diversity is a strength.”

Belonging to the Body of Christ

In the end, Anglicanism offers a way of belonging. To be an Anglican is to belong to a large family of more than eighty million people from every continent. The Anglican tradition provides order, structure, and support to its members in order to ensure the proclamation of the gospel and the growth and expansion of Christ’s Kingdom throughout the world.

Anglican Diocese of the Great Lakes



The Anglican Diocese of the Great Lakes is a diocese of the Anglican Church in North America, and was established June 2010. It currently has 54 congregations and two diocesan religious orders, in the American states of Illinois, Indiana, Kentucky, Michigan, New York, Ohio, Pennsylvania and West Virginia, and one in the Canadian province of Ontario. We have also just planted our first congregation in Mexico City.

1. HISTORY

The history of the Anglican Diocese of the Great Lakes starts in April 2003, when five parishes from northern Ohio left the Episcopal Church, because of its departure from orthodox Anglicanism, to align themselves with the Diocese of Bolivia, in the Anglican Province of South America. New parishes joined and expanded the ADGL. Because of geographical distance, it became clear it was not practical to integrate into the South American Province. The Great Lakes parishes transferred into the Convocation of Anglicans in North America in 2007, a missionary outreach of the Anglican Church of Nigeria. In December 2007, Roger Ames, the rector of St. Luke's Anglican Church in Akron, Ohio, was consecrated as suffragan bishop of CANA. The churches, now numbering 13 congregations, become the Anglican District of the Great Lakes of CANA, in August 2008, with Roger Ames as their first bishop. The district was a founding member, as part of CANA, of the Anglican Church in North America, in June 2009.

In an extraordinary Constitutional Convention, held in April 2010, the district became the Anglican Diocese of the Great Lakes. On June 9 of the same year, the Provincial Assembly of the ACNA unanimously recognized the new diocese. Roger Ames was elected at the Constitutional Convention their first bishop, being formally installed at the diocesan annual convention in Akron, Ohio on April 30, 2011. The ADGL now numbers over 50 congregations.

Upon Bp. Ames retirement, the ADGL held an extraordinary Synod, on October 3, 2015, which nominated three candidates to be considered for election as the new bishop of the Anglican Diocese of the Great Lakes. The College of the Bishops of the ACNA, meeting in Vero Beach, Florida, on January 6, 2016, elected The Rev. Dr. Ronald Jackson, as the second bishop of the ADGL. He was consecrated Bishop at St. Bernard Catholic Church in Akron, Ohio, on 28 April 2016. Bishop Jackson is ably assisted in the episcopal oversight of the Diocese by Bp. Ames and Bp. Peter Beckwith, retired bishop of Springfield.

(For a more expanded history see the ADGL website www.adgl.us .)

2. ANGLICAN DIOCESE OF THE GREAT LAKES – MISSION, VALUES & STRATEGIES

a. **Mission**—where we believe God is calling us

“The Anglican Diocese of the Great Lakes exists to make disciples who make disciples, grow churches who plant churches, and be a diocese that births new dioceses for the glory of Christ and His Kingdom.

b. **Core Values** — the underlying convictions that lie at the heart of the ADGL. These comprise the genetic code we seek to instill in each of our congregations,

The Centrality of Jesus Christ as Savior and Lord

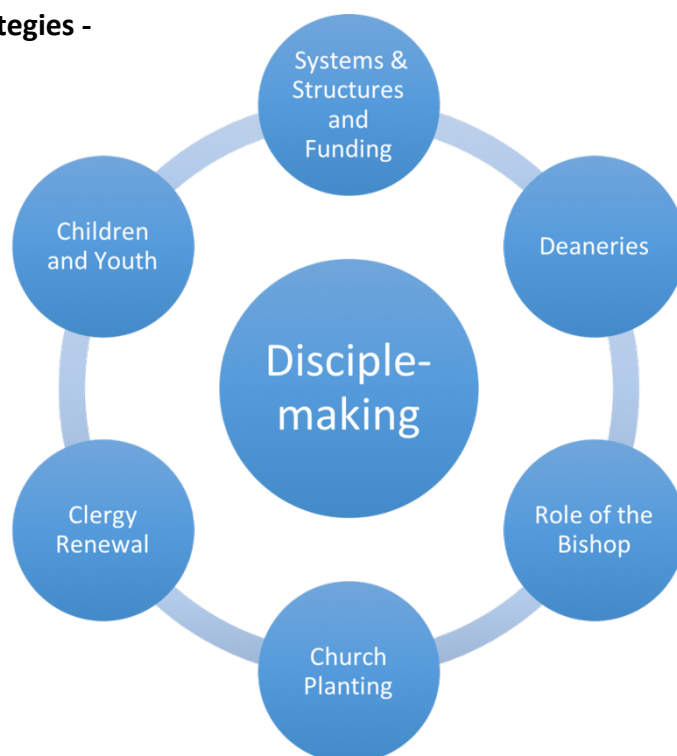
The Three Streams of the Anglican Tradition

Sacramental
Evangelical
Charismatic

Being Fully Alive to the Kingdom of God

To Bless
To Heal
To Serve

c. **Strategies** -



- 1.) **Disciple-Making:** Is at the heart of fulfilling the Great Commission. The ADGL is developing a disciple-making culture where all of our congregations are made up of disciples who make disciples, beginning with clergy and lay leaders in each congregation. The formation of a missional discipleship learning community has already begun.
- 2.) **Church Planting:** The ADGL is committed to expanding the Kingdom of God. To that end we are establishing a church planting culture and developing a church planting pipeline to provide training and support to raise up leadership and congregations that can multiply churches throughout the ADGL. The Rev. David Kulchar is Canon for Church Planting. Our goal is to ultimately dedicate 25% of our Diocesan budget to church planting.
- 3.) **Deaneries:** In response to what the Lord is doing in our local areas, we have established deaneries as missional networks to build relationships and to foster ministry collaboration and leadership development between our congregations throughout the Diocese. All clergy and every congregation is to be an active part of their deanery. Our deanery regions are:
- 4.) **Clergy Renewal:** To have a healthy diocese, we need healthy clergy and congregations. The aim of the Clergy Renewal Commission is to develop a clear, unified diocesan approach to personal, transformational healing prayer ministry. To provide the opportunity for all clergy to experience the benefit of personal healing ministry, be trained and given tools/resources to minister to others in their parish (pastoral care) and train and/or facilitate training to others (laity) to carry the ministry forward.
- 5.) **Children and Youth** - We believe that every congregation, regardless of its demographics, can have effective children and youth ministry. Mrs. Patty Jackson, a graduate of Fuller Seminary in Children and Family Life Ministry, is beginning the process of looking at how each church intentionally engages our children, youth, and young adults as she and Bishop Ron visit each parish in the diocese. The aim is that every parish, mission, or fellowship will have a clearly articulated plan to reach our young in response to what they hear in prayer from the Lord.
- 6.) **Role of the Bishop** - Goal: To develop a team that will assist and increase the care the Bishop can give to the clergy and congregations of the Diocese so that the ADGL can be more deeply connected and missionally motivated in our call to extend Christ's kingdom.
- 7.) **Systems, structure and funding:** The ADGL has grown quite rapidly over a large geographic area. It is important that we develop the systems and structures that will enable us to better care for our clergy and congregations more effectively and be a financially viable diocese that can give birth to new dioceses.

3. AREA DEANERIES

An Area Deanery is a collection of congregations grouped together for pastoral, missional and administrative purposes. An area dean will normally be the pastor of a congregation within the deanery. The appointment of an area dean is the responsibility of the bishop. The function of area deans is to be an extension of the bishop's office in his care for the clergy, congregations and mission of the Diocese. It is expected that all clergy and congregations will actively participate in the ministry of their deanery.

Area Dean's job description

The job of an area dean, can be summarized as follows:

- a. To help the Bishop in his episcopal oversight and care of the clergy and congregations of the deanery
- b. The Area Deans, in conjunction with the Diocesan Standing Committee, will be a primary leadership team, working with the bishop to develop the missional strategy of the ADGL. This will necessitate some gatherings and online meetings.
- c. To provide supportive and collaborative leadership for mission and ministry in the deanery by encouraging the development of shared ministry and mission in the deanery.
- d. To represent the Bishop sometimes in the installation of new vicars and rectors.
- e. To model and encourage our diocesan covenant commitment to "10-10-10 Stewardship" which is vital in enabling the ADGL to be a viable and sustainable diocese and to have the necessary resources to enable the Diocese to be proactive in planting churches to accomplish its mission. Our eventual goal is to have 25% of our Diocesan budget set aside for church planting.
- f. To build relationships and bring the deanery clergy together three to four times per year. Given distance and weather considerations on-line gatherings are appropriate - especially since they may make it more possible for bi-vocational clergy to participate.
- g. A Dean's appointment will be for a three-year period with the possibility of reappointment.

Area Deans & Deaneries:

- **Cleveland Area Deanery** - Dean: The Very Rev. Gene Sherman_
gsherman@christchurchwestshore.com
- **Akron/Canton Area Deanery** - Dean: The Very Rev. Mark Engel_
marka.engel@gmail.com
- **Southern Ohio Deanery** - Dean: The Rev. Canon Ron Feister_
saintnicholas@earthlink.net
- **Northern Indiana Deanery** - Dean: The Very Rev. Canon Ron Allen_
ron@heartlandfw.org
- **Southern Indiana Deanery** - Dean: The Very Rev. Dr. Joe Murphy_
Jpmd7501@gmail.com

- **Eastern Michigan Deanery** - Dean: The Very Rev, Allen Kannapell, allenkannapell@yahoo.com
- **Western Michigan Deanery** - Dean: The Very Rev. Brian Wolthuis, brian@3-sixty.org
- **The Great Lakes Deanery** (So. Ontario, Canada, Western New York, Mexico City - Dean: The Very Rev. Susan Zakamarko zakamarko0204@rogers.com
- **Kentucky Deanery** – Dean: The Very Rev. Pete Matthews, peter@stpatrickschurch.org

4. ADGL CLERGY COMMITMENTS

a. Attendance at Diocesan Synod – Title 1, Canon 1, Section 3 - *“Every member of the clergy canonically resident or licensed in the Diocese shall attend every meeting of the Synod unless excused by the Ecclesiastical Authority.* It is expected that all clergy will attend the **Fall Clergy Retreat** and **Spring Diocesan Synod** unless there is an emergency or other exceptional circumstances. It is your responsibility to contact the bishop and ask his permission to be excused. Both of these events are scheduled well in advance and should be factored into your scheduling and congregational budgeting.

b. It is expected that all clergy and congregations will actively be involved in their **Deanery**. We recognize that Bi-vocational Clergy may sometimes have circumstances that prevent them from attending a particular meeting. It is expected that you will contact your Dean and communicate to him/her why you will not be able to attend. We highly value that ministry and contributions of our bi-vocational clergy. To enable them to more fully participate, on-line deanery gatherings will also be held.

c. It is expected that all clergy will review and put into practice the **safe-guarding and best congregational administrative practices** laid out in this handbook. This is for your congregation’s and the diocese’s protection. If you have any questions about your particular congregation’s situation please contact the Canon to the Ordinary, **the Rev. Canon Ron Feister** at saintnicholas@earthlink.net or 614-832-0073

d. It is expected that all clergy and congregations will practice **10-10-10 Stewardship** as a part of their discipleship training. (see below)

5. CLERGY SUPPORT & NURTURE

We in the ADGL are very committed to being there for one another when our clergy or their families have needs. Please contact any of the Bishops or Deans. (see Key Contacts, page)

Personal Transformational Prayer (Spiritual, Emotional or Inner Healing)
Contact: The Rev. Dr. Carolyn Allen (260) 797-3070

Crisis or Psychological Counseling
Contact: The Rev. Dr. Lee Martin (330) 296-3279

6. CLERGY LICENSE TO OFFICIATE

A license to officiate in the diocese may be requested from the bishop by clergy living within this diocese who are canonically resident in another diocese, provided that they have first received a call to affiliate as an assistant priest at one of the congregations of the Diocese of the Great Lakes. Such licenses are to be reviewed annually by the bishop and an annual activity report must be submitted to the bishop by all licensed clergy prior to having their licenses renewed.

7. DIOCESAN STEWARDSHIP

Stewardship is foundational to Christian discipleship. The word stewardship comes from the Greek word *oikenomous*, which means somebody who manages a household. A person doesn't own the household but manages it.

Building on this definition, stewardship is what we do with all that we are and all that we have after we say 'yes.' to Jesus." Stewardship is how we bring Christ into the center of how we use our time, talent and treasure. Each of these areas is essential in a disciple's life.

As Christians in the 21st century, we need to embrace a larger biblical view of stewardship, which goes beyond church budgets or building projects. Biblical stewardship is about discipleship which connects everything we do with what God is doing in the world. As a Diocese we are committed to the Biblical principles of stewardship.

8. PERSONAL STEWARDSHIP

Bill Peel in his essay, *Leadership Is Stewardship* lays out four biblical principles which lie at the heart of Christian stewardship.

a. The Principle of Ownership - Psalm 24 declares: *"The earth is the LORD's and everything in it, the world and all who live in it."*

This is the fundamental principle of stewardship. God owns everything. We are simply managers on his behalf of the time, talent and treasure that He has entrusted to our care. If we belong to Christ, it is logical to assume that everything we are and have truly belongs to him.

b. The Principle of Responsibility - C.S. Lewis in his book *Mere Christianity* makes a telling statement: *"Every faculty you have, your power of thinking or of moving your limbs from moment to moment, is given you by God. If you devoted every moment of your whole life exclusively to His service, you could not give Him anything that was not in a sense His own already."*

Stewardship is the commitment of one's self and possessions to God's service. As disciples we recognize that our responsibility is to manage and use well the resources God has placed in our care.

c. The Principle of Accountability - Like the servants in the parable of the talents, we will all be called to give an account of what our Master has entrusted to our care. (Matthew 25:14-30)

We want all the people in the ADGL to hear Jesus say to them, *"Well done, good and faithful servant! You have been faithful with a few things; I will put you in charge of many things. Come and share your master's happiness!"* (Matthew 25:21)

d. The Principle of Reward - Colossians 3:23-24 *"Whatever you do, work at it with all your heart, as working for the Lord, not for men, since you know that you will receive an inheritance from the Lord as a reward. It is the Lord Christ you are serving."*

The Bible shows us in the parables of the Kingdom that faithful stewards who do the master's will with the master's resources can expect to be rewarded incompletely in this life, but fully in the next.

9. TITHING -

Tithing is a foundation on which the Anglican Church in North America is built. Our Provincial canons state, *"The biblical tithe is the minimum standard of giving in support of the Mission of the Church, and should be taught and encouraged at every level of the Church."* (Canon 9, Section 1)

1 Corinthians 16:2: lays out several principles which should undergird our teaching on giving. *"On the first day of every week, each one of you should set aside a sum of money in keeping with his income."* This passage brings out four points: we should give individually, regularly, methodically and proportionately.

The focus is not on "fund raising" but on discipleship. Our God is a giving God and he wants to raise giving children. Tithing does not teach that God gets 10% and we keep 90%. If we have accepted Christ as Savior and are seeking to follow him as Lord then all that we are and all that we have belongs to him.

Tithing is a spiritual discipline that empowers us to put Christ in the center of the material resources God has placed in our care. The deeper question is this: What has priority in our lives? Is Christ really first—or do we put ourselves and our own desires first?

We shouldn't be surprised, therefore, that the Bible offers 500 verses on prayer, fewer than 500 verses on faith, and more than 2,000 verses on money. In fact, 15 percent of everything Jesus ever taught was on the topic of money and possessions - more than His teachings on heaven and hell combined.

When we first come to Christ and begin our life as disciples, all we give is what we know how to give at that stage of our spiritual journey. We need to experience God's faithfulness and provision as we learn to live by faith and not by sight. As we learn to live by faith with our material resources, we gain spiritual confidence and freedom to step out in faith in other areas of life and ministry.

As clergy, we must have integrity as spiritual leaders. We must model what we want our people to become. This applies to every area of our life. Thus it is expected that all clergy are faithful tithers. We must model Christian discipleship in every area of life and the blessings that living by faith brings. We are the model of what our people will become. This spills over to our congregation's tithing to the Diocese as well as the Diocese's tithing to the Province. If people see their congregation being faithful in its tithing to the Diocese it will reinforce their giving to their congregation and the importance of this aspect of discipleship. Our Diocese faithfully tithes to the Province.

ADGL 10-10-10 Stewardship

When the Anglican Diocese of the Great Lakes was established all the clergy and congregations made a covenant commitment to one another to practice **10-10-10 Stewardship**. We covenanted that we would practice and teach personal tithing- giving 10% of our time, talent and treasure to the Lord, that each congregation would tithe 10% of their income to the diocese, and that the Diocese would tithe 10% of its income to the Province. It's about our relationship to Christ as stewards of his resources. It is also about our relationship to one another and our call to common ministry. In the ADGL, we want to be as committed to one another as we are committed to Christ. The principle is equal commitment and equal sacrifice to glorify God and expand his Kingdom. We believe that God will honor this commitment.

It is important that every congregation teaches stewardship as part of its ongoing discipleship training and teaching throughout the year. Additionally, many congregations have found that a yearly stewardship emphasis over several weeks leading up to a time of commitment to the mission and work of the parish is very helpful.

10. DIOCESAN WEBSITE RESOURCES

The Anglican Diocese of the Great Lakes Web Site provides a wealth of information regarding history, belief, practices, and ministry. The site can be accessed at <http://adgl.us/>.

Likewise, The ADGL Clergy Resource Site makes available all policies and documents clergy may need for personal and congregational issues. The site can be accessed at adglresources.com.

Pastoral Issues

1. ADGL POLICY ON CHRISTIAN MARRIAGE AND REMARRIAGE

a. Christian Marriage

The Anglican Church in North America and the Diocese of the Great Lakes affirm our Lord's teaching that the Sacrament of Holy Matrimony is in its nature a union permanent and lifelong of one man and one woman....As marriage is a lifelong covenant between a man and a woman in which the two become one flesh, it is both an ordinance of Creation, affirmed as such by our Lord, and commended by Saint Paul as a sign of the mystical union between Christ and His Church (Matthew 19:3-9; Ephesians 5:22-32)" (Anglican Church in North America, Canon II.7).

In asking that the Church solemnize their marriage, the bride and groom declare their desire to enter a covenant relationship before God and in the presence of His people. They commit themselves to each other for the rest of their lives and invite Jesus Christ to be at the center of their marriage. In their intention to live their married life within the fellowship of the Church, they ask a priest to bless their commitment and the congregation to uphold them in prayer. They enter a Christian marriage, hallowed by our Lord Jesus Christ, whose grace can sustain them to live together in love, joy and faithfulness.

b. Marriage in the Anglican Church

In order to be married in the Anglican Church in the Diocese of the Great Lakes, a member of the clergy, canonically resident or licensed in the Diocese*, must preside at the wedding. This officiant is the agent of both the State and the Church and is bound by the laws of the State** as well as The Book of Common Prayer and the Canons of the Church. These obligations require the officiant to ascertain the couple's ability and readiness rightly to enter into marriage. The officiant must ensure that they understand the nature, meaning and purpose of Holy Matrimony and that they are aware that they are entering into a lifelong covenant of physical and spiritual union.

c. Eligibility to Be Married in the Church

It shall be within the discretion of any member of the clergy to decline to solemnize any marriage (Canon II.7.2). A member of the clergy must decline to preside at any marriage that he or she believes should not take place.

* An Anglican priest who is neither canonically resident nor already licensed in the Diocese of the Great Lakes should contact the Bishop's office to obtain permission to officiate at a wedding in a church of the Diocese.

** The officiant must conform to the licensing requirements of the State in which the wedding takes place.

Both bride and groom must be baptized. Any exception to this requires the officiant to obtain the permission of the Bishop.

The officiant shall provide counsel to both parties on Holy Matrimony with respect to theological and social implications and responsibilities. Clergy are strongly urged to utilize trained lay couples who can assist in preparing couples for marriage. In the Diocese of the Great Lakes it is expected that this period of preparation shall be at least four months in length, following which, with the permission of the member of the clergy, invitations to the wedding and other public announcements may be sent. If the officiant waives this requirement for weighty reasons, the Bishop shall be notified immediately and in writing.

The officiant shall require the parties to sign the following declaration:

"We, A. B. and C. D., desiring to receive the blessing of Holy Matrimony in the Church, do solemnly declare that we hold marriage to be a lifelong union of husband and wife as it is set forth in the Book of Common Prayer. We believe it is for the purpose of the procreation (if it may be) of children, and their spiritual and physical nurture, for mutual fellowship, encouragement, and understanding, and for the safeguarding and benefit of society, and we do engage ourselves, so far as in us lies, to make our utmost effort to establish this relationship and to seek God's help thereto."

The officiant shall ascertain that the bride and groom have a valid marriage license.

In all cases, marriages shall be solemnized according to the forms contained in an authorized Book of Common Prayer, or other rite authorized by the Bishop.

The Clergy shall record in the church's register the name, age, and residence of each party. Such record shall be signed by the member of the Clergy, the married parties, and at least two adult witnesses.

No Clergy knowingly, after due inquiry, shall solemnize any marriage if they have unresolved concerns regarding the following impediments:

- (a) Consanguinity and affinity as defined in the 1662 Book of Common Prayer;
- (b) Mistaken identity or surgically altered sex;
- (c) Absence of the capacity for free and intelligent choice;
- (d) Bigamy, evidence of sexual perversion or conviction of a sexually related crime;
- (e) Fraud, coercion, abuse or duress.

d. Remarriage After Divorce

The failure of a marriage is always a tragedy, reflective of human brokenness and sin. Scripture acknowledges our fallen nature and does provide guidance to know when a marriage may be declared a nullity or dissolved and allows the possibility of a subsequent marriage in certain circumstances, such as adultery or abandonment by the former spouse (see Matthew 19 and 1 Corinthians 7; Canon II.7.4).

When a divorced person seeks permission to remarry, the officiant must ascertain the pertinent facts concerning a declaration of nullity or termination of marriage; and in the absence of a declaration of nullity, if either party has been married previously and the marriage ended in divorce, the officiant must submit to the bishop for approval of the new marriage at least 45 days prior to the proposed wedding date a completed Petition to the Bishop for Consent to Solemnize a Marriage after Divorce (Canon II.7.4).

Permission can be expected from the Bishop when the following criteria are met:

- there has been no more than one divorce (or annulment) for either the bride or the groom;
- the marriage did not end because of adultery committed by a person now seeking permission to remarry;
- there has been sufficient time since the end of the previous marriage(s) to allow for healing; this normally means that one year will have elapsed between the date of the final divorce decree(s) and the date of application to the Bishop.
- care for any children and, if appropriate, the ex-spouse have been provided;
- there is demonstrated repentance for the individual's role in the break-up of the previous marriage (even if the person did not commit adultery, there are always ways in which the person sinfully contributed to the break-up);
- there is an understanding of the biblical teaching about marriage and divorce (including the appropriateness of divorce only on biblical grounds) and a commitment to live under biblical principles in this marriage;
- it would not cause scandal or offense within the congregation;
- the previous spouse is not still in the same congregation;
- the other normal provisions for first marriages would be met (there has been adequate preparation, there is emotional and spiritual readiness to enter into the marriage, etc.).
- both bride and groom are baptized, committed to Christ and are active members of a church.

If there have been two divorces for either or both parties, the norm in the Diocese of the Great Lakes is for a civil marriage to be held in another location apart from the church's regular worship space. After a year of testing of the fruit of the marriage, a blessing of the civil marriage (without all the trappings of a typical wedding) could be held in the church with the permission of the Bishop, using the form, Petition to the Bishop for Consent to Bless a Civil Marriage after Divorce. In extraordinary circumstances, the officiant may petition the Bishop to waive this and permit a third marriage in the church;

in such a situation, the officiant is advised to consult with the Bishop well in advance, since the Bishop may require additional steps, such as an assessment by a professional counselor, which will need to be completed prior to the Bishop making his determination.

2. ADGL CHILDREN, YOUTH & VULNERABLE ADULT SAFETY POLICIES AND PROCEDURES

Almighty God, heavenly Father, you have blessed us with the joy and care of children: Give us calm strength and patient wisdom as we bring them up, that we may teach them to love whatever is just and true and good, following the example of our Savior Jesus Christ. Amen. - BCP, p. 829

To ensure a safe, secure, and loving environment for children, youth and vulnerable adults within the church, these guidelines need to be read, agreed to and followed by all current and future employees and volunteers.

ADGL Shared Safety Goals:

- Provide a place where all are safe from all forms of abuse. The ADGL has ZERO Tolerance for Abuse (sexual, emotional, physical, mental).
- Ministry Safe Training needs to be renewed for all every other year.
- Make prompt, pastoral response to allegations of abuse.
- This document needs to be read bi-yearly by all staff and volunteer working with children.

Definitions:

The following definitions shall apply to this policy:

Child, children, and minor - any individual under the age of eighteen or one whose mental capacity is that of a minor.

Teen or Youth - any individual between the ages of 13 and 18.

Vulnerable Adult - a person who may be unable to care or protect him/herself by means of mental disability, age or illness; usually considered a minor.

Adult - any individual at least eighteen years of age

Worker - any person who serves as a volunteer or employee and is responsible for assisting, caring for or working with minors.

Supervisor - A designated child or youth minister, or a volunteer in that position.

Safety Person(s) - A designated and recognized person, if not the rector, in your body that is familiar with this manual and in charge of safety issues in the building and/or with people.

Sexual Misconduct - Sexual abuse or molestation, child sexual abuse, or pastoral sexual abuse as defined below:

- Sexual abuse or molestation - any sexual involvement or sexual contact by any person with another person who is a minor or legally incompetent, or unwanted sexual contact between adults.
- Pastoral sexual abuse - The initiation, continuation or pursuit of a sexual relationship by clergy with a person with whom there is a pastoral relationship, even if the relationship is considered consensual; the use of exploitation of one's position in connection with sexual or emotional needs or desire.

Safety Supervisor:

- The Senior Pastor is ultimately responsible for the safety of the parish. However a person or a group may be appointed to report to the Senior Pastor.

Compliance Defined:

For Buildings:

- Implementing safety directives according to inspections.
- Clarifying, posting, and at least yearly practicing an emergency evacuation plan for babies and children to safely join parents. A local Fire Prevention Bureau can help plan the best way to safely evacuate your building.

For Employees and Volunteers::

- Screening all applications according to Diocesan guidelines.
- Sufficient staffing for all events.
- Report any safety or abuse concerns to the designated supervisor, pastor, or Bishop as needed.

Employee and Volunteer Screening:

- All volunteers working with children, youth, and vulnerable adults should have attended your church for six months.
- All employees and volunteers are required to complete an application, give one reference and permission to run a criminal background check.
- Volunteers under age 18 will complete an application and give two references.
- A face to face interview is recommended to discuss any application, but is not required.

Criminal Background Check:

The Diocese offers a thorough criminal background check for \$25. You are free to use a different source.

Worker's Training:

Once approved, each new employee or volunteer working with minors will be required to (1) read this manual and (2) sign the Policy Agreement Form, and (3) pass Ministry Safe Training.

Ministry Safe Training:

At this time, all clergy and those working with minors must be current every two years.

Please send the names and email addresses of each person needing to take the test to Lindsay Robinson at lrobinson.adgl@gmail.com. Each person's name and email needs to be entered into the Diocesan Ministry Safe link. Please allow up to 24 hours for an individual and more for a group for this step. Once you are notified that the information has been entered, **you have 36 hours to view the course and take the test.** Each time the link is sent, your church is charged \$5 per person for use of the site.

- We encourage you to have all training and ministry safe work done by the autumn as a good kick off to your year. This is helpful also with the Diocesan schedule.

Record Keeping:

Please keep all employee and volunteer applications, background check information, and Policy Agreement forms in a locked cabinet or room. (Any form with a Social Security Number must be kept locked.) Once a volunteer leaves a church, their information may be destroyed after 7 years.

Bishop's Visitation:

- We recognize that full compliance takes time. Please aim to have all standards met or arranged for by your Fall Kick-Off in September.

The Bishop's visitation will include checking that:

- Files of employees and volunteers include an application, a background check, and a current Ministry Safe certificate.
- Nursery facilities are clean and safe.
- Fire/emergency escape plans are clear, communicated, and practiced yearly.

Ministry Safeguard Behaviors:**1. Team Ministry:**

- Two adults need to be provided for each teaching or program event for children and youth. This provides support for any unforeseen mishaps that may happen with children and supports workers against false allegations. The second person may be a parent, a person in training, or a teen - age 13 and above who has applied to volunteer.

A strength of enforcing the two person rule means that people are in training and gaining a connection to what and how the children/youth are learning. It really is a win-win for all.

- When this is not possible, the group should join another class or the event closed.
- Checking for sufficient coverage should be done by the supervisor or safety person before children are received.
- Any exceptions need to be signed off by the Senior Pastor.

2. Open Door Policy:

- Classrooms and activities may be visited without prior notice by parents, volunteers, or staff.
- Rooms should have a window or an open door for entry at any time.

3. Nursery Standards:

- Two adults (or an adult and teen helper) must always be in the nursery even for one child.
- Only approved nursery workers (including approved teens) and parents will be allowed in the nursery.
- Cell phone use is allowed only in the case of emergencies, not for chatting. You may choose to contact parents in the service who have phones on vibrate.
- Diaper changing policies can be determined by your church. It is most church's policy to only have a family member or guardian change diapers. Diapering area needs to be observable by other adults.
- A Nursery Registration Form is included in the Form's List. Please use it consistently. **Important: Note the column that states who will pick up the child.**
- Nurseries and toys should be clean. Each church may set their own practices remembering that this is important to health and to visitors.

4. Restroom Practices

- If possible, have a restroom next to a nursery.
- A young child should be escorted to a bathroom by a second person that stays outside the door.
- If any child is gone too long, an adult needs to knock on the door and ask if help is needed before entering. If possible, keep the door ajar while assisting.

5. Suggestions for Good Discipline Practices:

- Children/youth will at all times be treated with respect and dignity. No physical punishment or demeaning language is to be used.
- If a child is behaving inappropriately, tell the child/youth what is the expected behavior. Watch and wait until they comply.
- If inappropriate behavior continues, separate the person from the activity, take to a quiet activity, or to a parent. Do not leave unsupervised. Meet after a calming down time to talk through the behavior with the child and possibly the adult.

6. Individual Relationships with Adults

- Counseling or Mentoring between adults and children/teens should meet in public view of other adults.
- If parent's permission is not possible for counseling, tell another staff person where and whom you are with. Be in view or easy access of other adults.
- No physical contact between counselor and counselee.
- The counselee should be informed that they are free to discuss any aspect of the one-on-one time with their parents.

7. Gift Giving:

- No staff, either paid or volunteer, are to give gifts to individual children or young people without the prior knowledge of a parent.

8. Appropriate Touching at Church:

- *Christian community involves touching as an expression of offering peace, affection in church, or for laying on of hands for healing prayer. It is wise to ask permission before any physical touch if a hand is not extended.*
- Appropriate physical touch with children or youth includes: high fives, side hugs, handshakes, thumbs up, head or back pats. Inappropriate touching is wrestling, tickling, lap sitting, frontal hugs, kisses on lips, comments on body image or forced affection.

9. When children/youth are not in class, they are the responsibility of the parent.

Off-Site Policies

1. Off-Site Events and Paperwork:

- Any off-site event must have a Permission Slip with Event Information filled out at the top of the page. The event must be approved by a supervisor and/or pastor in charge before announcing the event. Leave Event Plans and a contact phone number of an adult with the Supervisor or Pastor.
- Every child/youth must have a signed parental consent form with medical information. These are to be taken to the event.
- If there are any changes in time or place to the event, all parents must be called before leaving the current site.

2. Driving Policies:

- Only adults age 21 and over who possess a valid driver's license and have read and signed their agreement to this policy manual may transport children or youth to a church sponsored event. (Older siblings may transport younger siblings with written permission on record.)
- Groups of three should always travel together in a car.
- Seatbelts must be used.
- Cell phone use while driving is prohibited.
- Aim to caravan as a group with shared cell phone numbers between drivers.

3. House Churches are not under the church's supervision, but the responsibility of those participating.

Monitoring:

- Before Sunday morning activities begin, personnel should check in with the Supervisor.
- An easy way to announce two workers is to put names outside the door, as "A and B welcome you to Nursery/Class today."

General Policy Violations and Cause for Dismissal:

- Any direct observation or evidence of sexual advances, innuendos, or activity in the presence of an adult or minor.
- Infliction of physically abusive behavior or bodily injury to an adult or minor.
- Mental, verbal or emotional abuse, or bullying caused by, encouraged by or overlooked by a volunteer or employee directed at a child, youth, vulnerable adult, fellow employee or parishioner.
- The possession of obscene or pornographic materials at any church function, either on or off the property.
- The presence, possession, consumption, or being under the influence of any illegal drugs or alcohol during an activity involving minors, on or off the church property.

Reporting Suspected Abuse: :

1. Any person having cause to believe that someone has been a victim of mental, emotional, physical/medical, neglect or sexual abuse is required to report their belief to a Supervisor, Safety Person, or Rector.
2. If the accusation is of an employee or volunteer, they will be suspended during investigation.
3. The Senior Pastor will inform the Bishop. (The Canon to the Ordinary or legal Council will also be informed.)
4. The Senior Pastor will inform the liability department of their insurance company.
5. Each Senior Pastor should be familiar with the Child Abuse Reporting Requirements for their state. Each state has differing contact numbers and procedures. These two numbers can help guide you:
Child Welfare Information Gateway publishes a key contact number per state. Phone number is 1-800-4AChild.
Childhelp National Child Abuse Hotline has a database of 55,000 resources for reporting and accessing emergency services. Anonymous. 1-800-422-4453.
6. After reviewing the facts as reported by the victim and the accused, the Rector and Safety Person (the Bishop and legal counsel if needed) will decide on a course of action. Confidentiality needs to be observed throughout.

Forms Related to this Policy can be found on the ADGL Clergy Resources web page under Forms:

1. Application for Volunteers and Employees (Includes Criminal Background Check Release).
2. Reference Form for Volunteers and Employees
3. Authorization for a Criminal Background Check
4. Face to Face Interview Form
5. Policy Agreement Form
6. Nursery Sign In
7. Event Permission Slip (Includes permission to attend, medical, and photo release)

Summary Legal Guide

FOR PARISHES/MISSIONS OF THE ANGLICAN DIOCESE OF THE GREAT LAKES

I. Summary of Basic Organizational and Operational Requirements for Tax-Exempt Status

The following is a general summary of certain legal issues applicable to the parishes and missions of the Diocese. It is not intended to be a complete summary of all legal issues applicable to the churches. Churches should seek advice from an attorney licensed in their state of residence for purposes of seeking any legal advice with respect to their individual situations on these or other matters.

Corporate Formation - while not required under law, it is the policy of the Diocese that all [parishes] should incorporate as a nonprofit organization in the state in which it operates. This provides liability protection and helps simplify reporting and record keeping systems.

- The corporate form does impose some legal requirements, however, such as:
 - Registering with the state’s Secretary of State and filing Articles of Incorporation, and periodically updating the registration as may be required.
 - Having a board of directors (vestry or mission board in this case) to manage the affairs of the corporation.
 - Members of the vestry (or mission Board) should comply with any eligibility requirements in the Canons of the Diocese of the Great Lakes or Anglican Church in North America. In addition, members should be competent and aware of the governance requirements set forth in the parish governance documents (Articles of Incorporation and “bylaws” or “regulations” discussed below). It is also recommended that the vestry include members who are financially sophisticated.
 - Having officers with specific roles, consistent with the Canons, including Senior Warden, Junior Warden, Secretary, and Treasurer.
 - Adopting a set of rules for the organization’s operations, often called “bylaws” or “regulations.”
 - Both of the Articles of Incorporation and bylaws (together, the “Charter documents”) should be reviewed in light of the Canons, to make sure that the provisions do not conflict with the canonical provisions of the Diocese or the Anglican Church of North America.
 - It is also important that the Charter documents give a clear definition of the religious identity and purpose of the corporation. This is not only important for

non-profit law purposes, but to maximize protections with respect to religious liberties (see Section II. below). Samples of relevant Charter documents can be requested from the Chancellor of the Diocese.

- Duties of vestry (or mission Board) members – under law, board members have certain fiduciary duties to the organization, such as the duty of care and the duty of loyalty. The duty of care generally applies a “reasonable and prudent person” standard and requires the board member to act with the care a person in a like position would reasonably believe to be appropriate under similar circumstances. Although this duty impacts all areas of the oversight of the church, concerns with respect to this issue most frequently come up with respect to the oversight of church funds and investments. The duty of loyalty requires the vestry/mission Board member to act in good faith and in the best interests of the church. The duty of loyalty requires the avoidance of any conflicts of interests
- One of the first items of business for a new organization is opening a bank account. Virtually all banks will require an IRS “Employer Identification Number,” or EIN, before opening an account. This can sometimes seem odd in that small organizations may never plan to have any employees. But, obtaining an EIN is easy to do and can usually be done online or by telephone.
- While not required by state law, the parish/mission should adopt those other policies required by the Diocese, as well as consider adopting policies relating to record keeping, investment of funds, conflicts of interest, fundraising, etc.

Music Licensing – It is very important that any music used in the congregation be done with proper permissions and licensing.

Tax-Exempt Status – Unlike most non-profits, churches that meet the requirements of Section 501(c)(3) of the Internal Revenue Code are automatically tax exempt and are not required to apply for and obtain recognition of tax-exempt status from the IRS. That being said, many churches seek recognition of tax-exempt status from the IRS to assure church leaders, members and contributors that their contributions are generally tax-deductible. **[Question – does Diocese have an umbrella group ruling?]**

- In addition to the above organizational steps, there are some operational pitfalls to avoid to protect the organization, namely its tax-exempt status.
- The vestry/mission Board should meet regularly and keep minutes and records of its meetings.
- Solid financial records are important to show that the vestry/mission Board are meeting their fiduciary duty of care. All records, financial or otherwise, should be maintained with an eye towards transparency. Federal tax laws even require public access to certain tax-related documents.

- The church needs to always operate in a way that serves its purpose, and its activities should never benefit (directly or indirectly) members of the organization, officers or directors, their families, or their businesses.
- The church should never get involved (directly or indirectly) in any political campaign on behalf of (or in opposition to) any candidate for elective public office. Even the smallest amount of campaign activity or support of or opposition to a candidate can cost the church its tax-exempt status.
- The church should be careful in involving itself in any policy-related issues outside of electoral politics. Any such activity (e.g., supporting a march or protest or lobbying for or against any legislation) should be clearly related to the purpose/mission of the organization and be minimal compared to other activities.

Although beyond the scope of this summary, please contact an advisor to discuss possible limitations on tax-free status with respect to commercial activities on church property or other transactions with third-parties outside of the religious character of the church, as well as special tax rules related to clergy compensation.

II. Issues with Respect to Contracts and Dealings with Third-Parties

- As a general matter, it is the policy of the Diocese that any contract entered into by a parish/mission needs to be reviewed by an attorney licensed in your state before execution of such contract. Furthermore, no contract may bind the Diocese to any course of action, obligation or guarantee without the express approval of the Diocese.
- As a result of increased tension regarding religious freedom rights and the possible conflict between the churches' religious character and mission and contractual or other dealings with third-parties, it is important to be clear and consistent with respect to your mission and policies when dealing with secular third-parties. A few guidelines to consider in order to enhance defenses under the First Amendment or state Religious Freedom Restoration Acts include:
 - As stated above, it is important that the church Charter documents clearly depict the religious identity and purposes of the non-profit corporation.
 - Clearly articulate the religious character and mission of all specific ministries and activities (this can come into play with respect to the soup kitchens etc.)
 - Identify any religious character/qualifications for specific employment positions. These need to be as narrowly tailored as possible. You must be consistent/rigid in the application of these so called "bona fide occupational qualifications." Making exceptions for favored employees, may waive your rights for future controversies.
- Adopt a Facilities Usage Policy that articulates the religious purpose and nature of the church's property and impose religious requirements for its use. The policy should contain

a clear outside use approval process. Providing unlimited access to other groups may limit your ability to deny access to the facility for certain groups/activities in the future.

FINANCIAL POLICIES AND PROCEDURES

PROTOCOLS FOR ADGL CONGREGATIONS

Purpose

This policy exists to assure all employees and volunteers of the parish have understanding of the financial responsibilities of the ministry to perform their duties in an ethical, legal and transparent manner. Adherence to this policy is intended to provide a financially sound and effective framework for the financial management of the ministry. The policy recognizes that most congregations, ministries, and fellowships in the diocese are relatively small and have limited resources. Larger congregations may well need more detailed policy guidelines and are encouraged to work with the Diocesan Finance Committee to develop that which is needed or helpful.

Scope

This financial policy applies to all employees, volunteers, missions, congregations, fellowships, grant recipients and program managers of the same as well as members of Vestry or leadership team. Whenever the term vestry is used it also applies to all leadership group or management teams within any congregation, fellowship, or ministry that provides a function similar to a vestry within a parish.

Responsible Person(s)

Vestry – Responsible for development of policy.

Treasurer – Responsible for implementation of policy.

Rector – Overall supervision of the implementation of policy.

Financial Management Policy

Coming soon.

General Purpose

The purpose of these policies is to establish guidelines for developing financial goals and objectives, making financial decisions, and reporting the financial status of the parish and managing parish funds.

Financial Responsibilities

The Vestry is responsible to formulate financial policies and review operations/activities on a periodic basis.

The Vestry delegates this oversight responsibility to the Treasurer. This responsibility is shared through delegation with the Rector and other staff.

The Treasurer acts as the primary fiscal agent under the supervision of the Rector, implementing all financial policies and procedures. The Treasurer in cooperation with the Rector is responsible for the coordination of the following: Annual budget preparation, management of the Endowment and other fund investments, selection of the outside auditors (when appropriate), and approving revenue and expenditure objectives in accordance with the Vestry approved long-term plans.

The Treasurer has the day-to-day operations responsibility for managing parish funds, ensuring the accuracy of the accounting records, internal controls, financial objectives and policies, financial statement preparation, and bank reconciliation review and approval.

The designated Administrative Manager, when the position exists, is directly supervised by the Rector or Treasurer and is responsible for the preparation of the Chart of Accounts, Reporting Formats, Accounts Payable Processing, Payroll input and Payroll processing, Cash Receipts input, Journal Entries for General Ledger, Form 1099 reporting, Form 5500 reporting, and Form 990 reporting as well as Bank Reconciliations.

Conflict of Interest

Members of the Vestry are prohibited from activities that might present conflicts of interest. The powers of Vestry may not be used to personally benefit the Vestry member at the Ministries expense. If a Vestry member has a financial interest in a Ministry transaction, the Vestry member must fully disclose the interest and abstain from voting. Loans to Vestry members are prohibited.

Budgeting Process (The entire Vestry must approve the budget.)

The Rector and the Treasurer shall be responsible for presenting to the Vestry an annual operating budget. A suggested process and timeline is can be seen within this document.

The budget shall contain revenues and expenses forecasted by month. A chart describing monthly cash flow is recommended.

Financial Statements & Required Accounting Program

The financial statements shall be prepared on an accrual basis in accordance with Generally Accepted Accounting Principles ("GAAP").

Each parish, congregation, ministry or fellowship will as soon as practical utilize a generally accepted computerized program that incorporates GAAP for the recording of all financial transactions. Treasurer shall prepare and present a Monthly Financial Review. The Review shall be presented to the Rector and Vestry at the monthly meeting. In accordance with the diocesan canons an annual financial report shall be submitted to the diocese.

Cash Fund

A cash fund of one-quarter of the parish annual operating expenses should be established and maintained. When the fund balance falls below this minimum, the Treasurer and the Vestry shall develop a plan and budget for rebuilding it.

Audit

In accordance with the diocesan canons, each parish, congregation, ministry or fellowship will have an audit of its financial statements annually, within 4 months of the end of each fiscal year. The audit shall be completed by a competent uninterested individual not related to the vestry or treasurer, larger congregations should have the audit done by a firm of Independent Certified Public Accountants. The Rector and the Treasurer shall have direct responsibility in overseeing the implementation of the Annual Financial Audit and shall have Vestry oversight.

The appropriate staff person or auditor shall prepare the Form 990 and it shall be reviewed by the Rector and the Treasurer before submission to the IRS.

Revenue & Income Procedures

The Rector in conjunction with the Treasurer, develops and proposes revenue goals and objectives prior to Vestry discussion and approval.

All contributions shall be recorded in accordance with GAAP, with specific attention to standards FASB 116 and 117. Contributions are recorded as pledged or received in accordance with FASB 116, and must be credited to the appropriate revenue lines as presented in the annual budget and coded with the appropriate account number as designated in the Chart of Accounts.

Recording Receipts

The following procedures for cash received through the mail or given to a staff person shall be in place: Mail should be opened by a staff person that is not involved in the accounting function. All checks shall be endorsed with the official banking stamp. All cash and checks received through the mail shall be forwarded to the designated staff or other staff not involved in the accounting function. This person records all checks and cash by date, name of company or individual, designation, and amount.

The same procedures followed for cash receipts shall be followed when monies are received by employees or volunteers as contributions for special events.

Gifts received electronically, such as stock transfers or on-line contributions should be properly recorded by a staff person. Transactions should be periodically rechecked by the Treasurer.

The appropriate entries in the General Ledger books. The Accountant shall reconcile all logs of incoming cash/checks with the deposit slips, and with the record of receipts maintained by the Treasurer.

Receipts to Donors

All donors and contributors shall receive proper acknowledgment of their contributions in accordance with IRS Guidelines.

Expenditures Procedures

All expenditures shall be approved by the Rector or by an authorized designate in accordance with approved authorization levels. All expenditures shall be coded by account number using the approved Chart of Accounts as provided in the computerized accounting program.

The Administrative Manager maintains standard accounting records containing all aspects of the financial operations. They include but are not limited to: A general ledger, a check register, and a payroll register.

Invoices shall be approved by either the Rector or by an authorized designate in accordance with approved authorization levels. Following the review and approval, check payment vouchers shall be prepared and the invoices shall be distributed to the Administrative Manager for check payment preparation. Upon payment of a bill, a copy of the check or duplicate of the stub shall be stapled onto the bill and payment date and check number shall be printed on the invoice. The paid invoices shall be filed alphabetically according to company/individual name and shall be kept on a fiscal year basis on file.

Signature Policy

Two signatures shall be required unless otherwise decided by the Vestry, sign all checks, drafts, or orders for payment of money, contracts, and commitments for services issued in the name of the parish. In the absence of either individual, the signature of the Senior Warden of the Vestry must be obtained.

Compensation & Payroll

Payroll is executed periodically. Paychecks or direct deposits will be provided to each employee; payroll expenses shall be verified against payroll reports and direct deposit reports and reconciled with checking account reports.

The compensation of the Rector shall be determined by the Vestry and Rector compensation is based on a Vestry-approved process that considers comparable data and Rector performance. The salaries of all other employees shall be determined by the Rector and approved by the Vestry. Compensation ranges for all staff positions shall be approved by the Rector. No employee may be compensated outside of the approved range, without the approval of the Rector.

Local Travel & Reimbursement Expense

Employees and volunteers must abide by the Travel and Expense policy. Travel and expense reports for mileage, meals, hotel, supplies, etc., will be maintained by each employee or volunteer and then submitted to the Administrative Manager, Ministry or Program Lead for approval and payment on a weekly basis by the Administrative Manager.

Mileage to and from the employee's residence to the parish center is not reimbursable. Reimbursements will be based on the travel rate established by vestry and approved through the

budgeting process. Travel reimbursement shall not be above IRS guidelines. All parking and other expenditure receipts must be attached to the expense voucher as a condition for payment.

Credit Card Expenditures

If required, the Treasurer may with approval of vestry authorize the issuance of a ministry-issued credit card for employees who travel frequently. Employees must utilize that card only for required travel. Employees must submit a voucher that explains the business reason for items purchased using the credit card. The direct supervisor must approve the voucher, which is then submitted to the Accountant for recording and reconciliation.

Purchasing

Any expenditure in excess of an amount determined by the Vestry for the purchase of a single item should have bids from three (3) suppliers if possible; this is not a mandatory provision,

Purchase of less than the approved amount may be made at the discretion of the Rector or Treasurer without competitive bids. However, for fixed assets, reasonable diligence should be exercised to comparatively shop for available sources.

Any purchase made by a Vestry member on behalf of the parish will require prior approval by the Rector or Vestry.

Leases & Other Contractual Agreements

(Important point: these Procedures do not include procedures for building ownership. If the parish owns a building, then a separate section should be written.)

The parish may conduct operations from leased facilities. Leases and other contractual agreements are negotiated by the Treasurer and executed with the approval of the Rector. New leases in excess of an amount determined by the Vestry require the approval of the Vestry.

The Rector and the Treasurer are authorized to develop and enter into contractual agreements with vendors, bankers, and third parties for the purpose of ensuring the parishes general operations. The Vestry shall review such agreements and make recommendations when necessary.

Notes, Loans, etc.

All notes, loans and other indebtedness to be contracted in the name of the parish (except open accounts and all other routine banking transactions), shall require the signature of the Rector, unless otherwise specified by the Vestry or established in the present management policies and procedures. All indebtedness must be approved by the Rector with advice given to the Vestry.

Deeds, Conveyances, etc.

The Rector and the Treasurer shall execute all Deeds, Conveyances, Mortgages, Leases, Contracts and other instruments in the name of the parish.

Bank Accounts & Investment Accounts

The Treasurer through the Administrative Manager shall maintain and oversee Bank and Investment accounts, and ensure day-to-day financial operations. Several accounts may be maintained by the parish as follows: 1) Checking Account, 2) Money Market Account, 3) Certificates of Deposit, 4) Brokerage Account. These accounts may be changed as financial conditions and requirements change.

Checking Account

All checks, cash, money orders, and credit card deposits, are reviewed by the Administrative Manager and deposited in the appropriate Accounts in total. Fund raising events, foundations and donations and miscellaneous contributions, shall be deposited into the accounts. Monies shall be transferred from the Checking account into the Money Market Account or the investment account when necessary, by the Treasurer. Checks are written weekly to meet obligations, or ongoing operational expenditures.

Bank Reconciliations

Bank reconciliations shall be completed monthly by the Administrative Manager and cross-referenced with the cash and receipts logs and the monthly Financial Statements. The Financial Statements shall be compiled by the Administrative Manager. The Statements shall be then reviewed by the Treasurer and presented to the Vestry.

All Bank Statements, Credit Card Statements, and Endowment Fund Reports will be reconciled every month by the Administrative Manager, and records will be kept in the Finance office.

Cash & Cash Equivalent

Cash and cash equivalents include all cash balances and highly liquid investments with a maturity of six months or less. The parish places its temporary cash investments with highly rated financial institutions. The Treasurer shall closely monitor the balances of the Checking account, Money Market and Certificates of Deposit accounts. At times such investments may be outside of the FDIC insurance limit.

Petty Cash

A petty cash fund provides a systematic method for paying and recording out-of-pocket cash payments too small to be made by check. The parish endeavors to maintain a Two Hundred (\$200.00) petty cash fund that is replenished as needed.

The Administrative Manager shall maintain control of, and responsibility for, payments disbursed from the Petty Cash fund; however, amounts should not exceed an amount determined by the Vestry for each transaction. The total Fund should not exceed an amount determined by the Vestry.

Investments Reports & Investments Policy

Investments shall be reported with the monthly financial statements at cost or market value. The Rector and Treasurer, with oversight of the Vestry, shall review and determine the general investment strategy for all funds.

The philosophy of the parishes short-term investments is safety of principal and liquidity. Acceptable investments shall be: Certificates of Deposit and Bankers Acceptances rated A1; Domestic Corporation Commercial Paper rated A1 and/or P1 by two (2) major rating services; all short-term Securities of the U.S. Government or an agency thereof.

The Endowment Fund investment strategy shall be reviewed and evaluated by the Vestry annually, to ensure the portfolio's proper diversification, security and return on investments.

All financial institutions shall be selected and approved by the Vestry and must have long-term investment rating of A or higher by Standard and Poor's, or a compatible rating.

Insurances

Reasonable and adequate coverage will be maintained to protect parish interests as well as the Vestry and parish employees. The following insurance policies shall be kept on a yearly basis: Commercial Property Contents including a Computer Policy, General and Professional Liability Insurance, Directors and Officers Liability Insurance, Employee's Dishonesty Bond Insurance, Employee's Life Insurance, Workers Compensation Insurance, Long-Term Disability Insurance, and Employees Health Insurance. Insurance Policies shall be carefully reviewed by the Rector and Treasurer before renewal each year.

Bonding

Vestry (or governing board) shall determine the officers and positions requiring bonding, and if such is needed. It will also determine the level of bonding or coverage by a theft insurance policy.

Property & Equipment

Property and equipment shall be stated at historical cost. Depreciation is computed over the estimated useful lives of the assets using the straight-line method. A Depreciation schedule shall be prepared and maintained by the Administrative Manager on an annual basis, taking into consideration the annual equipment inventory. A Property Removal Form shall be required for the removal of parish property, supplies, and/or equipment from parish premises.

Donated Materials & Services

Donated materials and equipment shall be reflected in the Financial Statements at their estimated values measured on the date of receipt. Volunteers donate time to parish Program services on an on-going basis. Other volunteers contribute time and services for Administrative or fund raising activities. Such contributed services are generally not reflected in parish financial statements, since there is no objective way of assessing their value.

Confidentiality & Records Security

Financial records are restricted materials with limited access. Only the Treasurer and Administrative Manager (or others so authorized) shall have access to financial records (vendor files, checks, journals, payroll, etc.).

Document Retention

Financial documents are retained for a period of time as specified in the parish Document Retention Policy.

Tax Reporting

The parish is exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code as amended. Accordingly, no provisions for income taxes shall be reflected in the financial statements.

Creation of Church Debt

Creation of parish debt is controlled by ADGL canon 23. Congregation debt in excess of ten percent (10%) of its average annual income over the last three (3) years may only be incurred with the written consent of the Bishop and Standing Committee and any application for such approval shall include a plan of payment.

Total indebtedness of a congregation may not exceed three hundred percent (300%) of its average annual income over the previous three (3) years. The Standing Committee may waive the limit with good cause.

Discretionary Funds

Congregations may create discretionary funds that are either funded as a budget item or by designated contributors or combination of both. These funds exist so that the pastoral staff may meet unusual or unforeseen pastoral needs not routinely provided for in the budget. These are **not** to be used to cover the personal or professional expenses of the pastoral staff and should not be seen to be the personal funds of the pastor or vicar.

Effective Systems of Internal Control

General

Internal control can be divided into two areas: accounting controls and administrative controls. Administrative controls deal with the operations of the business, whereas the accounting controls deal with accounting for such operations. Accounting controls should be designed to achieve the five basic objectives:

Validation

Validation is the examination of documentation by someone with an understanding of the accounting system, for evidence that a recorded transaction actually took place and that it occurred in accordance with the prescribed procedures. As systems grow more sophisticated, validation is a built in component whereby the transactions test themselves against predetermined exceptions.

Accuracy

The accuracy of amounts and account classification is achieved by establishing control tasks to check calculations, extensions, and additions and account classifications. The control objective is to be certain that each transaction is recorded at the correct amount, in the appropriate, account, in the right time period.

Completeness

Completeness of control tasks ensures that all transactions are initially recorded on a control document and accepted for processing once and once only. Completeness controls are needed to ensure proper summarization of information and proper preparation of financial reports. To ensure proper summarization of recorded transactions as well as a final check of completeness, subsidiary ledgers and journals with control accounts need to be maintained.

Maintenance

The objective of the maintenance controls is to monitor accounting records after the entry of transactions to ensure that they continue to reflect accurately the operation of the business. The control system should provide systematic responses to errors when they occur, to changed conditions, and to new type of transactions. The maintenance function should be accomplished principally by the operation of the system itself. Control maintenance policies require procedures, decisions, documentation, and subsequent review by a responsible authorized individual. Disciplinary control tasks, such as supervision and segregation of duties, should ensure that the internal control system is operating as planned.

Physical Security

It is important in all business organizations that the assets are adequately protected. Physical security of assets requires that access to assets be limited to authorize personnel. One means to limit access to both assets and related accounting records is through the use of physical controls. Protection devices restrict unauthorized personnel from obtaining direct access to assets or indirect access through accounting records that could be used to misappropriate assets. Locked storage facilities restrict access to inventories, and fireproof vaults prevent access

to petty cash vouchers. Transaction recording equipment limits access to assets by limiting the number of employees involved in recording and posting transactions.

Sample Budget Process Timeline

- August 15 – Budget planning forms distributed to all Ministries and Programs
- Sept 1 – Budget forms due to Outreach and Program Heads
- Sept 1 – 15 – Budget and Outreach leads coordinate with Ministry Committee and other stakeholders to produce first pass, rollup budget for their discipline.
Administrative Manager produces first pass general budget based on historical expenditures and known future changes.
- 3rd Wk Sept - Rector, Treasurer, Leads and Admin Mgr. meet to construct first pass, full parish budget.
- 4th Wk Sept – Leads discuss major discrepancies with individual Missions or Programs. Adjustments made to individual mission or program plans resulting from discussions.
- 1st Wk Oct - The Rector , Treasurer, Leads and Admin Mgr. meet to make necessary adjustments resulting from Missions and Programs discussions. Second pass budget produced.
- 2nd. Wk Oct - 2nd budget submitted to vestry for review.
- 3rd Wk Oct - 2nd budget submitted to vestry for approval or modification. Modifications discussed with relevant parties and adjustments made to individual budgets.
- 2nd Wk Nov - 3rd budget submitted to vestry for review.
- 3rd Wk Nov - 3rd budget submitted to vestry for approval.
- End Nov - Final budget published.

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Clergy Support and Healing

(Crisis and Formal Counseling available to all clergy and their families)

The Rev. Canon Dr. Lee Martin

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Appendix 1

Excerpts from The Canons of the Anglican Church in North America

Title II, Canon 7 Of Christian Marriage

Section 1 –

The Anglican Church in North America affirms our Lord's teaching that the Sacrament of Holy Matrimony is in its nature a union permanent and lifelong of one man and one woman.

Section 2 –

It shall be within the discretion of any member of the Clergy to decline to solemnize any marriage.

Section 3 –

Members of the Clergy of this Church shall conform to the Canons of this Church governing the solemnization of Holy Matrimony.

1. Both parties shall be baptized. Any exception to this requires the permission of the Bishop;
2. There shall be thirty (30) days notice of intention to marry unless waived for weighty reasons, in which case the Bishop shall be notified immediately and in writing;
3. The Clergy shall provide counsel to both parties on Holy Matrimony with respect to theological and social implications and responsibilities;
4. The Clergy shall ascertain that the man and woman, parties to the marriage, have a valid marriage license.

Section 4 –

As marriage is a lifelong covenant between a man and a woman in which the two become one flesh, it is both an ordinance of Creation, affirmed as such by our Lord, and commended by Saint Paul as a sign of the mystical union between Christ and His Church (Matthew 19:3-9; Ephesians 5:22-32). Therefore, the failure of a marriage is always a tragedy. Scripture acknowledges our fallen nature and does provide guidance to know when a marriage may be declared a nullity or dissolved and allows the possibility of a subsequent marriage in certain circumstances (Matthew 19 and 1 Corinthians 7).

1. Couples who request to be married by a member of the Clergy of this Church must have approval from their Bishop if either party has ever been divorced;
2. When a divorced person seeks permission to remarry, the Clergy must ascertain the pertinent facts concerning a declaration of nullity or termination of marriage; and in the absence of a declaration of nullity, forward such information to the Bishop in writing for his godly advice and consent;
3. The Diocese is responsible to create a process by which this discernment may be made with reasonable promptness.

Section 5 –

1. No Clergy knowingly, after due inquiry, shall solemnize any marriage if they have unresolved concerns regarding the following impediments:

- (a) Consanguinity and affinity as defined in the 1662 Book of Common Prayer;
- (b) Mistaken identity;
- (c) Absence of the capacity for free and intelligent choice;
- (e) Fraud, coercion, abuse or duress.

2. Any declarations of nullity may only be granted by a Bishop with jurisdiction and shall be based upon Scriptural principles including the foregoing impediments to marriage.

Section 6 –

The Clergy shall require the parties to sign the following declaration:

“We, A. B. and C. D., desiring to receive the blessing of Holy Matrimony in the Church, do solemnly declare that we hold marriage to be a lifelong union of husband and wife as it is set forth in the Book of Common Prayer. We believe it is for the purpose of the procreation (if it may be) of children, and their spiritual and physical nurture, for mutual fellowship, encouragement, and understanding, and for the safeguarding and benefit of society, and we do engage ourselves, so far as in us lies, to make our utmost effort to establish this relationship and to seek God’s help thereto.”

Section 7 –

In all cases marriages shall be solemnized according to the forms contained in an authorized Book of Common Prayer, or other rite authorized by the Bishop.

Section 8 –

The Clergy shall record in the Parish register the name, age, and residence of each party. Such record shall be signed by the member of the Clergy, the married parties, and at least two witnesses.

**Title II, Canon 8
Of Standards of Sexual Morality and Ethics**

Section 1 –

Clergy and lay leaders of this Church are called to be exemplary in all spheres of morality as a condition of being appointed or remaining in office.

Section 2 –

In view of the teaching of Holy Scripture, the Lambeth Conference of 1998 and the Jerusalem Declaration, this Church upholds faithfulness in marriage between a man and a woman in lifelong union, and believes that abstinence is right for those who are not called to marriage, and cannot legitimize or bless same sex unions or ordain persons who engage in homosexual

behavior. Sexual intercourse should take place only between a man and a woman who are married to each other.

Section 3 –

God, and not man, is the creator of human life. The unjustified taking of life is sinful. Therefore, all members and clergy are called to promote and respect the sanctity of every human life from conception to natural death.

Section 4 –

The Church is called upon to show Christ-like compassion to those who have fallen into sin, encouraging them to repent and receive forgiveness, and offering the ministry of healing to all who suffer physically or emotionally as a result of such sin.

Appendix 2

The 1662 Book of Common Prayer Table of Kindred and Affinity, Wherein
Whosoever Are Related Are Forbidden to Marry Together

A Man may not marry his:

mother
daughter
adopted daughter
father's mother
mother's mother
son's daughter
daughter's daughter
sister
wife's mother
wife's daughter
father's wife
son's wife
father's father's wife
mother's father's wife
wife's father's mother
wife's mother's mother
wife's daughter's daughter
wife's son's daughter
son's son's wife
daughter's son's wife
father's sister
mother's sister
brother's daughter
sister's daughter

A Woman may not marry her:

father
son
adopted son
father's father
mother's father
son's son
daughter's son
brother
husband's father
husband's son
mother's husband
daughter's husband
father's mother's husband
mother's mother's husband
husband's father's father
husband's mother's father
husband's son's son
husband's daughter's son
son's daughter's husband
daughter's daughter's husband
father's brother
mother's brother
brother's son
sister's son

In this Table the term 'brother' includes a brother of the half-blood, and the term 'sister' includes a sister of the half-blood.

