

THE DIOCESE OF LONG ISLAND
36 Cathedral Avenue
Garden City, New York 11530

THE DEPARTMENT OF MISSION

POLICIES AND PROCEDURES

Reviewed and Revised
November 2003

CONTENTS

Policy Title	Page Number
I. Definitions	3
II. Standards for Decision to Yoke or Cluster	4
III. Governing Authority	6
IV. Personnel	7
V. Vacancies	8
VI. Internal Operations	9
VII. Property Management	11
VIII. Administration and Finances	13
IX. Insurance Coverage and Church Pension Fund	16
X. Responsibility of the Clergy	17
XI. Funding	18
XII. Revolving Loan Fund	19
XIII. Development	20
XIV. Goals for All Mission Congregations, Aided Parishes Yoked Parishes, and Clustered Congregations	21
XV. Criteria for Return to Parish Status	22
XVI. Merging	24
XVII. Other Options	25

THE DIOCESE OF LONG ISLAND

DEPARTMENT OF MISSION

POLICY/PROCEDURE

I. Definitions

Reviewed: 11/2003
Page 1 of 1

1. Mission Congregation

A Mission Congregation is an unincorporated church, chapel, preaching station or congregation meeting regularly in a particular location and having a regular body of members.

2. Aided Parish

An Aided Parish is an unincorporated church, having a regular congregation, which receives regular subsidies from the Department of Mission or is unable to meet its financial obligations, which has applied for such status to seek aid, or an unincorporated church, which has applied for such status, with or without the expectation of subsidy. No congregation shall be eligible for entering a Yoking Agreement or a Cluster Agreement until it shall have applied for and received Aided Parish Status.

3. Yoked Congregation

A Yoked Congregation is one of two congregations (i.e., Aided Parishes, Missions, or one of each) of the Diocese, which, being unable to finance the full time ministry of a resident clergy, has agreed to yoke with another congregation and jointly share the full time ministry of a resident clergy.

3. Clustered Congregation

A Clustered Congregation is one of three to five Aided congregations (Aided Parishes or Missions, or one of each) which, being unable to finance the full time ministry of a resident clergy, has agreed to share in the joint ministry of a staff or clergy (two or more).

THE DIOCESE OF LONG ISLAND

DEPARTMENT OF MISSION

POLICY/PROCEDURE

II. Standards for Decisions to Yoke or Cluster

Reviewed: 11/2003

Page 1 of 2

The decision to form and/or join a Clustered Congregation shall be a joint decision of the Vestries of the units involved on the basis of discussion with their Archdeacon and under his/her guidance. The basis for forming such Yoked or Clustered Congregations shall be based on the following criteria:

1. Financial Viability

The units shall acknowledge that they are financially unable to support full time ministry.

Note: No new part-time Rectorships or ministries as priest-in-charge shall be allowed. In addition, no congregation shall be allowed to continue with supply clergy for any extended period of time, not to exceed six months, without the specific permission of the Bishop. Either the Bishop will appoint a vicar on the basis of his authority under the Canons (Title VIII, Canon 6, Section X) or there will be a full-time interim where a congregation can support a full-time ministry during the search for a Rector.

2. Contract

2.1. Duration

In either a Yoked or Clustered Parish, the agreement to enter joint operation shall be on the basis of a three to five year contract.

2.2. Renewal

Such contract is renewable and/or alterable with adequate review, and no party shall cancel a contract prior to its stated date of termination.

2.3. Cancellation

Should any unit plan to cancel the contract at its end, they shall give written notice to the other unit or units, to the Bishop, to the Archdeacon, and to the Department of Mission no less than one year before such termination.

3. Budget

3.1. Joint Budget

In either a Yoked or a Clustered Parish, there shall be a joint budget which shall cover the costs of the support of the clergy and the operation of an office, possibly including secretarial help.

3.2. Yoked Parish

In a Yoked Parish, each unit shall contribute 50% of this cost.

3.3. Clustered Parish

In a Clustered Parish the support of this budget shall be part of the contractual agreement among the congregations.

Note: Housing shall be provided at local market value; utilities, maintenance, and repair shall be a part of the joint budget.

3.4. Individual Unit Budget

3.4.1. In either a Yoked Parish or a Clustered Parish, each congregation shall also have an individual budget.

3.4.2. Items included may be maintenance and repair of property, its operation, utilities, local programs (e.g., Sunday Schools, music, etc).

4. Council

4.1. Function

Each Yoked Parish and each Clustered Parish shall have representatives of its Vestry or Bishop's Committee on the Council which shall serve as the managing body for their joint operations, including whatever part they play, at the Bishop's pleasure, in the choice of clergy.

4.2. Size

The size of this Council shall be a part of the contract among these units.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE
III. Governing Authority

Reviewed: 11/2003
Page 1 of 1

1. Bishop Is Rector

The Bishop of the Diocese is the Rector of all Mission Congregations, all Aided Parishes, all Yoked Congregations, and all Clustered Congregations.

2. Jurisdiction

The Bishop may designate, in accordance with the Canons, a Coadjutor Bishop, a Suffragan Bishop, or an Assistant Bishop to have full oversight, authority, and jurisdiction of any or all such units.

3. Archdeacons as Managers

The Archdeacons of the Diocese act as the Bishop's day-to-day agents and managers in the operation of these units, having the Bishop's delegated authority in such units.

4. Department of Mission

The Department of Mission cooperates and assists in this management, and, where appropriate, also acts as a counsel of advice to the Trustees of the Estate in matters relating to property to which they hold title, i.e., all unincorporated parishes.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE
IV. Personnel

Reviewed: 11/2003
Page 1 of 1

1. **Appointment by Bishop**
All clergy serving Mission Congregations, Aided Parishes, Yoked Congregations, and Clustered Congregations are appointed by the Bishop, are accountable to the Bishop, and serve at the Bishop's pleasure. Although not required to do so, the Bishop may give congregations whatever voice in the appointment process the Bishop chooses.

2. **Ecclesiastical Authority**
The Bishop is the ecclesiastical authority. Each clergy assigned to a particular congregation in any of these categories is expected to carry out the Bishop's plan for that particular unit, to cooperate with the Archdeacon responsible, to cooperate with the Department of Mission, and to conform to these Policies and Procedures.

3. **Compensation**
The rate of compensation for all clergy-in-charge appointed by the Bishop and serving any of these congregations shall be the Diocesan Base Salary as established by the Diocesan Convention and implemented by the Department of Mission in relation to these units. In the case of Clustered Congregations, the clergy-in-charge of the cluster may be paid more than the Base Salary at the Bishop's discretion, depending on the amount of responsibility involved.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE
V. Vacancies

Reviewed: 11/2003
Page 1 of 1

1. **Vacancies to be published**

In accordance with Diocesan Canons (Title VII, Canon 6, Section II), any vacancy shall be published to the clergy of the Diocese of Long Island so that they may apply to the Bishop for consideration.

2. **Process of Appointment**

The Archdeacons, acting as the Bishop's agents, will handle the process of appointment as they handle the election of Rectors.

3. **Congregational Profile**

An updated congregational profile, including a demographic profile, will be required from every vacant Mission Congregation, Aided Parish, Yoked Congregation, and Clustered Congregation as a necessary resource in the process of appointment.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE
VI. Internal Operations

Reviewed: 11/2003
Page 1 of 2

4. **Annual Meeting**

Every congregation shall hold an Annual Meeting in accordance with the provisions of the Religious Corporations Act of the State of New York and the Canons of the Diocese of Long Island.

5. **Elections**

2.1. **Unincorporated Missions**

At the Annual Meetings, unincorporated Missions shall elect two (2) Wardens (one a year in alternating years) and no less than three (3) Bishop's Committee members.

2.2. **Aided Parishes**

Aided Parishes shall continue to elect the same number of members as defined in their Articles of Incorporation.

2.3. **Yoked and Clustered Congregations**

Each Yoked Congregation and Clustered Congregation shall elect the number of Vestry members as defined in their Articles of Incorporation to be appointed by the Bishop as their Bishop's Committee unless the Bishop shall increase that number.

2.4. **Appointment by the Bishop**

In the case of unincorporated Mission congregations and Aided Parishes, the persons so elected shall be nominated to the Bishop for appointment as members of the Bishop's Committee with the understanding that they serve at the Bishop's pleasure.

6. **Requirements**

Eligibility of voters, candidates for office, and terms of office shall in all cases conform to the Religious Corporations Act of the State of New York

7. Peculiar Ministries

Any ministry not having regular members and/or not responsible for real property shall function with an Advisory Committee appointed by the Bishop in accordance with the “Articles of Organization” specifically designated by and approved by the Bishop and the Department of Mission.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE

VII. Property Management:

For Bishop's Committees and Vestries of Yoked/Clustered Parishes

Reviewed: 11/2003

Page 1 of 2

1. Approvals

No construction, purchase of property, sale of property, or renovations of buildings may be undertaken without the approval of the Bishop, the Trustees of the Estate, and the Standing Committee. Such approvals will not be granted without the recommendation of the Department of Mission and the approval of the appropriate Archdeacon.

2. Preparation of Proposals

Proposals for the purchase or sale of property or the construction or renovation of buildings will be prepared by the Bishop's Committee or Vestry and submitted with copies of all details, estimates, drawing, specifications, etc. [1] to the Bishop; [2] to the Trustees of the Estate; [3] to the Standing Committee; [4] to the Archdeacon; and [5] to the Chair of the Department of Mission.

3. Three Sets of Bids

At least three sets of bids on equivalent specifications shall be submitted for any construction or renovation.

4. Payment Plan

A written plan for the payment of the cost of the project shall also be submitted to the Bishop, the Archdeacon, and the Chair of the Department of Mission.

5. Signature on Contracts

No contracts may be signed by the Bishop's Committees where the property title is held by the Trustees of the Estate. Such contracts must be submitted to the Bishop and Trustees for legal signature and authorization.

6. Authorization for Signature

No contracts may be signed by the Bishop's Committee of an Aided Parish or by the Bishop's Committee of a Yoked or Clustered Congregation without written permission from the Bishop, the Trustees of the Estate, and the Standing Committee upon recommendation of the Archdeacon and the Department of Mission.

7. Maintenance of Property

It shall be the responsibility of the clergy-in-charge and the Bishop's Committee or the clergy-in-charge and Vestries to maintain all property and fabric of buildings in good repair. Grounds must be kept clean and neat.

8. Physical Changes

Structural changes to the fabric or permanent installations of fixed furniture, memorials, or equipment may be made only after receiving written consent from the Bishop on the recommendation of the Archdeacon and the Department of Mission.

9. Memorials

No memorials altering the appearance of use of the grounds and/or buildings may be accepted without prior advice and consent of the Bishop on recommendation from the Archdeacon and the Department of Mission.

10. Memorials as Diocesan Property

Memorials in redundant churches become property of the Trustees of the Estate Belonging to the Diocese of Long Island.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE
VIII. Administration and Finances

Reviewed: 11/2003
Page 1 of 3

All Clergy, Vestry/Bishop's Committee members, and Treasurers are responsible for compliance in the following areas.

1. Canonical Requirements

The following canons are cited for particular attention and adherence:

- 1.1. Canon 7 of the Canons of the Canons of The Episcopal Church, "Of Business Methods in Church Affairs."
- 1.2. The following sections from the Canons of the Diocese of Long Island:
 - a. Title V, Canon 2, "Securing an accurate overview of the state of the Church in this Diocese."
 - b. Title V, Canon 3, "Business methods in Church affair."
 - c. Title VII, Canon 7, Parish Registers
 - d. Title IX, Canon 4, "Requirements Respecting the Laity in the Diocese on the Subjects of Child Sexual Abuse and Sexual Harassment."

11. Religious Corporations Act of the State of New York

Attention is also called to the appropriate provisions of the Religious Corporations Act of the State of New York which are printed in the Journal of the Diocese.

12. Proposed Annual Budget

Each congregation under the administration of the Department of Mission shall annually prepare and submit to its Archdeacon and to the Chairman of the Department of Mission a proposed budget of anticipated receipts and expenses for the succeeding year. Special forms are provided and the material shall be presented in that fashion for the sake of easy comparison and study. The Archdeacon and/or the Department may request a meeting with the Priest or Deacon-in-Charge and Bishop's Committee or Vestry.

13. Stewardship Asking

Each congregation shall provide for the payment of its tithe. These payments shall be made to the Treasurer of the Diocese on a regular monthly basis.

14. Stewardship Program

Each congregation shall have an ongoing Stewardship Program under the leadership of the Bishop's Committee and clergy-in-charge whose responsibility it will be to plan and execute an appropriate stewardship program each year. Acceptable approaches include, but are not limited to: Every Member Canvasses, Parish Dinners, and Cottage Meetings. Lay leaders and clergy in charge of congregations are expected to seek guidance and support from the Department of Stewardship, which can provide consultation for the effective implementation of alternative programs.

15. Diocesan Appeals

Each congregation will participate in and financially support official Diocesan appeals such as Episcopal Charities to the best of its ability.

16. Building Funds and Savings Accounts

Building funds and savings accounts in excess of \$5,000 total shall be sent to the Treasurer of the Diocese to be invested in an account for the congregation. Interest on such accounts shall accrue unless it may be appropriately sent to the unit as income.

17. Title to Property, Legacies, and Bequests

8.1 No mission congregation may hold titles to buildings or real property, nor may they legally receive legacies. If such a unit is notified of a legacy, it must immediately notify the Archdeacon and the Bishop so that proper arrangements may be made for its acceptance. Persons wishing to leave bequests for mission congregations should make them as follows:

“To the Trustees of the Estate of the Diocese of Long Island, in true (here name the mission church or ministry), at (address), listing any restrictions or special uses intended.”

8.2 Copies of wills or notices of probate must be forwarded to the Trustees of the Estate, who will receive and process the request on behalf of the unit.

18. Loans, Contracts

Missions, Aided Parishes, Yoked Congregations and Clustered Congregations may not borrow money or create any other set of obligations to repay, beyond normal service contracts and insurance without prior consent of the Bishop on recommendation of the Archdeacon and the Department of Mission. All contracts must be signed by the Bishop or by a person designated by him.

19. Treasurer

The Clergy-in-Charge shall in no case serve as the Treasurer of such a unit. The Treasurer will be appointed by the Clergy-in-Charge with the consent of the Bishop's Committee or shall be elected by the Bishop's Committee in a Yoked or Clustered Congregation. In addition, in a Yoked or Clustered Congregation there shall be a Treasurer responsible for the joint budget.

20. Business Methods

The handling of money, i.e., counting, depositing, check writing, bookkeeping, etc., shall conform to the procedures outlined in the “Manual of Business Methods in Church Affairs,” mandated by the General Convention of the Episcopal Church. This Manual is available from Episcopal Parish Services (1-800-903-5544).

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE

IX. Insurance Coverage and Church Pension Fund

Reviewed: 11/2003

Page 1 of 1

5. Multiperil Policy

The Diocese insures congregations under a blanket multiperil policy. The amount and terms of coverage will be reviewed and updated periodically. Each unit is responsible for paying its insurance bills in a timely manner.

6. Inventory of Contents

It is essential that each congregation keep an up-to-date inventory of all such building contents, etc., which is to be revised every three years. A current copy of the inventory shall be filed with the Chair of the Department of Mission.

7. Workers Compensation

Workers Compensation and Disability benefits are covered under a separate policy for Mission units. All congregations are responsible for seeing that these bills are paid on a timely basis.

8. Health and Life Insurance

Each congregation is responsible for seeing that the health insurance and life insurance premiums for the clergy are paid in a timely fashion.

9. Church Pension Fund

Each congregation is responsible for seeing that the clergy church pension assessment is paid in a timely fashion.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE
X. Responsibilities of the Clergy

Reviewed: 11/2003
Page 1 of 1

10. Duties Specified by Bishop

The duties and responsibilities of the Clergy-in-Charge will be specified by the Bishop. It is possible that the Bishop will ask the Archdeacon to be the Bishop's agent in these matters.

11. Final Authority in Disputes

In case of any dispute concerning policies and procedures, the Bishop is the final authority.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE
XI. Funding

Reviewed:11/2003
Page 1 of 1

12. Application

It is the policy of the Department that each unit seeking financial support shall make specific application on the Annual Budget Form no later than November 25 of each year, requesting a specific amount of aid.

13. Method of Payment

When a final Budget has been approved by the Diocesan Convention, the Department will allocate specific resources for each unit for the next calendar year. The Treasurer of the Diocese will be authorized to pay each congregation receiving assistance 1/12th of the approved grant on a monthly basis. The check will be sent to the unit's Treasurer.

14. Arrearages

Should any assisted congregation fail to pay any of the required items for clergy support, the Department may instruct the Treasurer of the Diocese to suspend payment to the congregation and use the allocated funds to pay those items on behalf of the assisted unit.

THE DIOCESE OF LONG ISLAND

DEPARTMENT OF MISSION

POLICY/PROCEDURE
XII. Revolving Loan Fund

Reviewed: 11/2003
Page 1 of 1

The Department of Mission manages a Revolving Loan Fund to which congregations may make application to borrow small amounts at an interest rate equal to that currently established by the Trustees of the Estate. Such application shall be made for purposes of approved projects for the repair of property or some other project, approved by the Bishop on recommendation of the Archdeacon and the Department of Mission.

THE DIOCESE OF LONG ISLAND

DEPARTMENT OF MISSION

POLICY/PROCEDURE

XIII. Development

Reviewed: 11/2003
Page 1 of 1

It is the policy of the Department that each congregation shall work towards self support. In the case of financially aided congregations, this should mean a gradually decreasing dependence on assistance from the Department. Mission congregations should be working towards Parish status. Yoked Parishes and Clustered Parishes should be working towards a return to Parish status. However, it must be clear that all such development must be based on sound fiscal mission and ministry.

THE DIOCESE OF LONG ISLAND

DEPARTMENT OF MISSION

POLICY/PROCEDURE

XIV. Goals for All Mission Congregations, Aided Parishes,
Yoked Parishes and Clustered Congregations

Reviewed: 11/2003

Page 1 of 1

1. Incorporation/Parish Status

The Department, the Archdeacons, and the Bishop, aware that some ministries and congregations will probably never attain total financial self-support, nevertheless hold out the goal of incorporation of all units. The Bishop, the Archdeacons, and the Department are equally aware that not all Aided Parishes or Yoked or Clustered Congregations will be able to return to Parish status either, but hold out the same goals to them.

21. Requirements

Generally the conditions and requisites outlined in Policy XV “Yoked Congregations or Clustered Congregations Seeking to Return to Parish Status” will be required for Mission Congregations to apply to the Bishop and the Department of Mission for permission to start the incorporation proceedings. These same conditions apply to Aided Parishes seeking to return to Parish status and to Yoked Congregations or Clustered Congregations seeking return to Parish status.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE

XV. Criteria for Return to Parish Status

Reviewed: 11/2003
Page 1 of 2

Yoked Congregations or Clustered Congregations seeking to return to Parish status shall abide by the following criteria:

1. Financial Viability

The congregation shall give sufficient evidence of its capability to manage its affairs in all areas of its life and work. It shall also give evidence of its ability to continue its financial independence on the basis of the stewardship of the congregation. This standard shall be that the percentage of the normal cost of congregational operation, i.e., clergy support, maintenance, operations and programs, which comes from the pledged income, shall represent at least 60% of the total income.

22. Payment of Diocesan Asking

The Bishop's Committee shall have paid its Diocesan Asking for at least the last three years, be in a financial position to continue paying its Diocesan Asking, and commit itself to doing so in the future.

23. Ministry to the Community

The congregation shall be ministering to the community in which it is physically situated with outreach programs and services.

24. Self-Support

The congregation shall have been fully self-supporting for a period of no less than three years before an application for change of status can be considered. This will include, but is not necessarily limited to, the following criteria:

a. **Diocesan Asking**

The Vestry or Bishop's Committee shall have been paying its full Diocesan Asking for the full three year period.

b. **Arrearages**

There shall have been no arrears in insurance premiums, insurance payments for the clergy, or Church Pension Fund payments or other related items for the full three year period and all shall be current at the time of application.

c. **Loans**

All loans, whether from the Trustees of the Estate, the Department of Mission, or any other outside source, shall have been completely paid.

25. Mandated Reports

The Vestry or Bishop's Committee shall have regularly complied with the National Canons (Title I, Canon 7), and the Diocesan Canons (Title V, Canon 2, Section II) concerning the Annual Parochial Reports and (Title V, Canon 2, Section 1 [g]) concerning Annual Audits.

26. Clergy Support

The Vestry shall commit itself in writing to continue to support its clergy at no less than the Diocesan Base Salary with other requisite benefits.

27. Property Maintenance

All buildings and properties shall be maintained in good physical appearance.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE
XVI. Merging

Reviewed: 11/2003
Page 1 of 1

In the case of Yoked Congregations and Clustered Congregations, there may come a time or times when such units should merge. When that time arrives, the issues need to be worked out with the Bishop, the Archdeacons, and the Department of Mission:

2. Property

- a. Which property is to be kept and which sold?
- b. On what basis is the decision to be made?
- c. This applies equally to church buildings and rectories.

28. Identity

- a. How is the continuity of identity to be carried out in the new setting?
- b. Will the names be combined or changed?
- c. How will memorials be handled?

29. Conditions of Merger

- a. Under what conditions will the merger take place?
- b. What are the financial terms/understandings associated with the merger?
- c. What definition of mission is assumed in the merger?
- d. How will ministries continue in the respective communities?

30. Initiation of a Merger

- a. The congregation(s) may initiate a merger.
- b. The Archdeacon may do so, acting for the Bishop.
- c. After due study, the Department of Mission may recommend a merger.

31. Facing Realities

A merger may well be a sign of new life and a new understanding of ministry and mission. The nineteenth century paradigm of local parish/clergy does not necessarily apply to the twenty-first century. However, we need to understand that old way die hard.

THE DIOCESE OF LONG ISLAND
DEPARTMENT OF MISSION

POLICY/PROCEDURE
XVII. Other Options

Reviewed: 11/2003
Page 1 of 2

In addition to the option of merging, it is to be understood that the decision may be made to close a congregation and suggest to its members that they join the nearest local congregation. The Canons of the Diocese (Title VII, Canon 3, Section VI) state that if, in any congregation, there are less than twenty-five (25) worshippers on a regular basis for a one year period, the unit may be closed. In addition to this, the Bishop, the Archdeacons, and the Department must insist, in the name of good stewardship, that congregations ask themselves the hard questions about the number of worshippers, the number of pledges for parish support, the total of amount of said pledges, the percentage of the budget of the unit which is financed outside pledges, and how long such a situation can be allowed to continue. What kind of stewardship is it to simply spend the resources into the ground without really doing anything more than maintaining a “family chaplaincy”? Obviously, the “maintenance mode” is not Mission and Ministry. In such cases, one of the functions of the Bishop, the Archdeacon, and the Department of Mission may be a pastoral ministry to the death of the congregation.