Items to cover...

- VESTRY ROLES
- CHURCH BUSINESS – FINANCE/ADMINISTRATION
- CIVIL AND CANON LAW
- RISK MANAGEMENT/INSURANCE
- CONGREGATIONAL DEVELOPMENT
- COMMUNICATION
- DEVELOPMENT/FUND RAISING
- KEY DATES FOR ACTION
- DIOCESAN LIFE – TRAININGS/EVENTS
- WHO TO CALL/CONTACT
- QUESTIONS
Ephesians 4:11-13

“\textit{The gifts he gave were that some would be apostles ... (wardens, vestry members, treasurers)... some prophets, some evangelists, some pastors and teachers, to equip the saints for the work of ministry, for building up the body of Christ, until all of us come to the unity of the faith and of the knowledge of the Son of God, to maturity, to the measure of the full stature of Christ.”}
VESTRY ROLES

The purpose of a Vestry:

SERVANTS CALLED TO LEADERSHIP

- SENIOR/BISHOP’S WARDEN
- JUNIOR WARDEN
- SECRETARY
- TREASURER
- VESTRY MEMBER
- CLERGY
WHAT IS A VESTRY?

THE VESTRY IS THE BODY WITHIN A CHURCH THAT, WITH THE CLERGY, LEADS THE PARISH BY:

- Helping to discern and communicate the vision toward which God is drawing the congregation
- Acting as corporate board of directors
- Planning
- Identifying goals and ways to achieve and measure them
- Being good stewards
- Establishing and monitoring programs
- Communicating...
- Assessing performance – mutual ministry review
SENIOR/BISHOP’S WARDEN

- Regularly meet with rector/vicar to review, plan, anticipate and resolve problems
- Provide leadership to vestry and congregation
- Pray daily for rector/vicar, congregation
- Maintain confidentiality
- Resolve conflict
- Prepare and deliver reports
JUNIOR WARDEN

- Assist Rector/Vicar and Senior Warden in providing leadership
- Help to solve problems
- Pray daily
- Meet regularly with Rector and Senior Warden to relay people’s needs/concerns
- Understand property maintenance needs
- Annual safety checks
- Oversee the general upkeep and maintenance of facility
TREASURER

- OVERSEE COLLECTIONS, COUNTING, AND DEPOSITS OF ALL CONTRIBUTIONS
- OVERSEES ALL ACCOUNTS MAINTAINED BY CHURCH TO ASSURE PROPER ACCOUNTING PROCEDURES ARE FOLLOWED
- ASSURE ALL BILLS ARE PAID ON TIME
- ASSURE ADEQUATE INSURANCE IS IN PLACE
- ASSURE ALL BOOKS MEET STANDARD ACCOUNTING PROCEDURES
- ASSURE ALL TITLES, CONTRACTS, ARE PROPERLY MAINTAINED PER CIVIL LAW
- ASSIST IN THE DEVELOPMENT OF BUDGETS
- ACTIVE MEMBER OF THE FINANCE COMMITTEE
- PROVIDES FOR ANNUAL AUDIT OF THE BOOKS AND FINANCIAL PORTION OF ANNUAL PAROCHIAL REPORT
SECRETARY/CLERK OF VESTRY

- TAKE NOTES AND PREPARE MINUTES
- MAINTAIN A FILE OF ALL MINUTES
- TAKE MINUTES FOR ANNUAL PARISH MEETING
- PREPARE, SIGN & MAINTAIN DOCUMENTS AS NEEDED
ALL VESTRY MEMBERS...

- ARE AGENTS AND LEGAL REPRESENTATIVES OF CHURCH
- ENSURE THAT STANDARD BUSINESS METHODS ARE OUTLINED AND OBSERVED
- NOMINATE PERSONS TO HOLY ORDERS
- ARTICULATE CONGREGATION’S MISSION
- ENSURE EFFECTIVE CONGREGATIONAL PLANNING, RESOURCES, STEWARDSHIP
- ESTABLISH AND MONITOR PROGRAMS
- COMMUNICATE TO CONGREGATION, COMMUNITY, & LARGER CHURCH
Vestry Resource Guide

For vestries, wardens, and clergy

What:
A practical manual covering topics including the role and definition of a vestry, canons about clergy and vestry roles, job descriptions for wardens, treasurers and clerks, and responsibilities for stewardship. (Includes four brochures: What is a Vestry? What is a Congregation? What is a Diocese? and The Episcopal Church and The Anglican Communion.)

Why:
To assist the clergy and lay leadership in congregations throughout the Episcopal Church in understanding the work they do together.

How:
Order by calling Forward Movement Publications at 800-543-1813 or on their website:
http://www.forwardmovement.org/Products/1951/the-vestry-resource-guide.aspx
CHURCH GOVERNANCE - ADMINISTRATIVE AND FINANCE ASPECT OF CHURCH LIFE

- The church is not a business, but there is a business aspect to the church
- Business dealings must be carried out legally, ethically, and morally correct
- Vestries are the local bodies of the church responsible for this – along with their rector/vicar
MANUAL OF BUSINESS METHODS IN CHURCH AFFAIRS

- Diocesan Standard per Council Resolution in 2007
- Can be downloaded at:
- Not available in hard copy or CD anymore
I. FINANCIAL MANAGEMENT

- BUDGETING
  - GUIDELINE – NOT ABSOLUTE
  - ANNUAL PLAN TO DETERMINE FINANCIAL RESOURCE NEEDS
- BUDGET IMPLEMENTATION AND REVIEW
  - MONTHLY VESTRY MEETINGS – FINANCIAL REPORTS
- CAPITAL FUNDS – LARGER PURCHASES
- CASH MANAGEMENT
- LONG-TERM FINANCING – ENCUMBRANCE OF PROPERTY
- INVESTMENT MANAGEMENT
II. INTERNAL CONTROLS

- BOOKKEEPING SYSTEMS
- INTERNAL CONTROL QUESTIONNAIRE – EXAMPLES:
  - IS THE BUDGET APPROVED BY THE VESTRY?
  - ARE AT LEAST TWO UNRELATED PEOPLE COUNTING COLLECTIONS?
  - IS THE PERSON WRITING THE CHECKS DIFFERENT FROM THE PERSON(S) SIGNING THE CHECKS?
  - ARE ALL BANK ACCOUNTS RECONCILED WITHIN 10 DAYS OF RECEIPT OF THE BANK STATEMENT?
  - IS PETTY CASH PROTECTED FROM THEFT OR MISPLACEMENT?
  - IS THERE ADEQUATE INSURANCE?
  - ARE PERSONNEL FILES PROPERLY MAINTAINED?
III. BOOKKEEPING

BASIC RECORD KEEPING

– A/P, A/R
– PAYROLL
– SPECIAL FUND ACCOUNTING
– LOANS
– INVESTMENTS
– EQUIPMENT, FURNITURE, FIXTURES
– MONTHLY, QUARTERLY AND YEAR END REPORTING
– NET ASSET REPORTING
IV. TAXES AND THE CHURCH

- PAYROLL TAXES
  - CLERGY – SELF EMPLOYED, BUT CONSIDERED AN EMPLOYEE
    - HOUSING ALLOWANCE EXEMPTION
- TRAVEL AND BUSINESS EXPENSES – 60 DAYS
  - MILEAGE FOR BUSINESS USE REIMBURSES AT IRS RATE – CURRENTLY $0.54 PER MILE
- TAX EXEMPT STATUS
  - EXEMPT UNDER NATIONAL CHURCH
  - EXEMPT UNDER DIOCESE
  - EXEMPT UNDER OWN NON-PROFIT EXEMPTION
- UNRELATED BUSINESS INCOME TAX
- PROPERTY TAX- May be lost if rentals to for-profit entity
V. CLERGY DISCRETIONARY FUNDS

- MOST ASKED QUESTION IN OUR OFFICE
- NATIONAL CHURCH TITLE III, CANON 14, 2(F)
- TO BE USED FOR “PIOUS AND CHARITABLE USES AS SHALL BY (CLERGY) BE THOUGHT FIT. DURING A VACANCY, A VESTRY SHALL APOINT A RESPONSIBLE PERSON TO SERVE AS ALMONER.”
- NOT TO BE USED FOR ANYTHING CONSIDERED AS PERSONAL GAIN - FOR SELF OR FAMILY MEMBER
- MUST BE INCLUDED IN THE ANNUAL AUDIT/REVIEW OF FINANCIAL RECORDS
- FUNDS STAY WITH THE CHURCH WHEN THE CLERGY PERSON LEAVES
VI. AUDIT GUIDELINES FOR CONGREGATIONS
(covered later by joanna)

- Annual audits are required by Canon to be done annually with a copy sent to the Diocesan Office by September 1st of each year – for the previous year’s books.

- To help and assist in good financial management

- Does not need to be a CPA audit unless warranted

- The Diocese has a list of approved auditors/reviewers

- Protects the integrity of the clergy and vestry in financial matters
VII. RISK MANAGEMENT AND INSURANCE

- RESPONSIBLE STEWARDSHIP
- *TITLE I, CANON 7(6):*
  - ALL BUILDINGS AND THEIR CONTENTS SHALL BE KEPT ADEQUATELY INSURED, AND...

- *TITLE I, CANON 7(3):*
  - TREASURERS AND CUSTODIANS, OTHER THAN BANKING INSTITUTIONS, SHALL BE ADEQUATELY BONDED, EXCEPT TREASURERS OF FUNDS THAT DO NOT EXCEED $500 AT ANY ONE TIME DURING THE FISCAL YEAR.
VIII. PAROCHIAL REPORTS

- REQUIRED BY NATIONAL CANON AND DIOCESAN CANON
- DUE MARCH 1st EACH YEAR – FILED ONLINE WITH A HARD COPY WITH SIGNATURES TO THE DIOCESAN OFFICE
- VITAL RECORDS SUCH AS CHURCH MEMBERSHIP, BAPTISMS, CONFIRMATIONS, ASA
- FINANCIAL RECORDS SUCH AS PLEDGE NUMBERS, PLEDGE AND PLATE TOTALS, GENERAL OPERATING AND OUTREACH FINANCIAL INFORMATION
- USED TO TRACK TRENDS AND HISTORY OF THE CHURCH
IX. RECORDS MANAGEMENT

- VESTRY HAS CUSTODIAL RESPONSIBILITY OF ALL CHURCH RECORDS
- RECORD RETENTION POLICY
  - FEDERAL AND STATE LAWS
  - SPECIAL CLASSES – TAXES AND EMPLOYMENT
- OBSOLETE RECORDS – DISPOSAL/SHREDDING
  - DON’T DESTROY RECORDS PENDING LEGAL LITIGATION
- PERMANENT RECORDS
  - BUILDING PLANS, ANNUAL REPORTS, TRUST FUND DOCUMENTS, RESTRICTED GIFT DOCUMENTS, ENDOWMENTS, MEETING MINUTES, DEEDS, MEMORIAL REGISTERS, ETC.
- RETENTION SCHEDULE IN THE MANUAL
APPENDIX A: FORMS

- FOR TREASURERS AND CONGREGATIONS: IRS AND TAX FORMS - LISTING IN MANUAL ON WHERE TO OBTAIN
- I-9 – EMPLOYMENT ELIGIBILITY FORM
- CHURCH PENSION GROUP FORMS (CPG)
- SEVERAL SAMPLES INCLUDED IN MANUAL OF GENERAL BUSINESS FORMS SUCH AS MILEAGE AND TRANSPORTATION EXPENSE REPORT; CHECK REQUEST FORM; SAMPLE HOUSING RESOLUTION FOR CLERGY.
APPENDIX B: GLOSSARY

- A LISTING OF MOST EVERY WORD/PHRASE YOU MAY NOT KNOW THE DEFINITION OF RELATED TO CHURCH BUSINESS METHODS...

- THAT’S IT FOR A QUICK RUN THROUGH THE MANUAL

- ON TO FINANCIAL MATTERS
Joanna Shreve
Treasurer for the Diocese

Richard Mueller
Chair of the Finance Committee
Diocesan Budget Process

• Receive requests for funding by the late spring

• Budget Advisory Committee (BAC) reviews all funding requests and proposes a draft budget to the Board of Trustees by no later than the August meeting

• Board of Trustees recommends draft budget to convention

• Road show to present budget to convention delegates in August/September

• Budget presented and approved at convention in November
Diocesan Fairshare

• Set by Convention Resolution by Diocesan Canon

• Presently 10% of the first $206,000 and 20% above that of NDBI

• In line with other Dioceses across the country – some have a higher assessment some lower. We are somewhere in the middle.

• Unlike many dioceses, we do not have large endowments to underwrite our operations, so the major portion of Diocesan funding comes from Fairshare contributions.

We thank you!
Annual Church Audits – Financial Reviews

• Diocesan Canon states that every congregation will have performed an annual audit/review of their financial records
• This is to be done by auditors/reviewers that have been trained and approved by the Finance Committee
• The Diocese provides training every other year for potential auditors
• You can contact the Diocesan office to get a listing of approved auditors
• A copy of your audit report needs to be sent to the diocesan office upon completion
Additional Financial Resources

- **Handouts:**
  - 10 Steps of Successful Budgeting and Oversight
  - 10 Fiscal and Fiduciary Resources

- **Don’t re-invent the wheel**
  - Work with other congregations
  - Find others using the same financial software program
  - Do reciprocal audits

- **Great resource reminder – Church Business Manual**
  
Nancy Cohen
Chancellor for the Diocese of El Camino Real
CIVIL AND CANON LAW

- The church is governed by both civil law and canon law

- Civil law – Applies to churches with some exceptions

- Legal entity – TEC, Diocese of ECR, Parishes
  - All non-profit corporations
  - All have Articles of Incorporation and By-Laws – all Vestry members should have copies. Make sure they are updated according to Chancellor sample
  - Missions are under Diocesan control and corporate ID
  - All congregations fall under the tax exempt umbrella of the Diocese and National Church
  - A listing is sent every year to IRS to protect your non-profit tax ID status-includes diocesan churches, schools, missions
  - Directors and officers liability/insurance
Legal Issue Examples

• Employment Issues
• Rental agreements – as Lessee or Lessor
• Other real estate contracts
• Grant proposals
• Bids for work, services, equipment
• Endowments/Other financial issues
• Avoid Cell Tower agreements; at least get advice
• Settlement agreements
• Approval for encumbrance of parish property
• Raffles/Lotteries
• Credit Cards
• Confidentiality/Conflict of Interest
• Copyright – Sermons belong to church
• Penal Code 320.5 – Charitable Exemption

• 320.5. (a) Nothing in this chapter applies to any raffle conducted by an eligible organization as defined in subdivision (c) for the purpose of directly supporting beneficial or charitable purposes or financially supporting another private, nonprofit, eligible organization that performs beneficial or charitable purposes if the raffle is conducted in accordance with this section.

(b) (A) At least 90 percent of the gross receipts generated from the sale of raffle tickets for any given draw are used by the eligible organization conducting the raffle to benefit or provide support for beneficial or charitable purposes, ....

• (c) For purposes of this section, "eligible organization" means a private, nonprofit organization that has been qualified to conduct business in California for at least one year prior to conducting a raffle and is exempt from taxation pursuant to Sections 23701a, 23701b, 23701d, 23701e, 23701f, 23701g, 23701k, 23701l, 23701t, or 23701w of the Revenue and Taxation Code. (d) no employee or other compensation. (e) no machines.

• (h) (1) An eligible organization may not conduct a raffle authorized under this section, unless it registers annually with the Department of Justice. ....
Credit Cards

• Issue only for church business/ to limited ees
• Do not “help” clergy by issuing church credit card for personal expenses
• Adopt expense policy to reconcile credit expenses
• Dollar limit on what charged
• Use sparingly when statement won’t issue
• Control person monitors monthly
VESTRY MEETINGS

• Circulate agenda & docs few days prior to Mtng.
• Who presides
• Robert’s Rules
• Use executive sessions for review/pay discussions; separate minutes
• Interested members must recuse selves
• List action items
• Trust
Confidentiality/Conflict of Interest

• Confine employee discussions to need to know

• Decide among vestry when any issue public

• Adopt Conflict of Interest Policy

• Vestry members/officers sign Policy addendum annually

• Honor collegial relationship
Personnel Policies

• Clergy letters of agreement
• Hiring/Reviews/Terminations
• Parity lay/clergy for health benefits & fairness
• Pensions – 18% of clergy salary and housing
• Social security – normal for lay – clergy are self employed or employees, choice
• Unemployment insurance – not required to participate – issue upon termination
• Exempt/nonexempt; Nonexempt unless 1 of 5 exemptions
• Defamation
• Sick leave see 2015 notice
INDEPENDENT CONTRACTOR

• File 1099 for IC earning $600 during year

1. **Who controls manner and means of work?**
2. Does church instruct or supervise worker?
3. Can worker quit or be fired at any time?
4. Is work being performed part of church business?
5. Does worker have separately estab. business?
6. Worker make decisions affecting own profitability?
7. Worker have investment in tools/means of work?
8. Worker furnish tools, equipment, supplies?
9. Work unskilled or semi-skilled?
10. Church provide training?
11. Worker pay fixed salary, hourly, piece rate?
12. Worker previously church employee?
SCHOOLS

• Written contracts
• Contracting with the Head of School
• Policies and procedures for leave, non-discrimination and termination
• Exempt vs. non-exempt employees (wage and hour issues)
• Faculty/student/parent interactions, including social media
• Supreme Court decision, *Hosana-Tabor Evangelical Lutheran Church and School vs. EEOC*
CHURCH CONTROLS SCHOOL

• Church creates, controls, owns and manages the school
  • School professes to be Episcopal
  • Decide whether to have separate corporation; consider liability issues
    • Church members on school board, provide in corporate documents
• If one corporation, does vestry manage all school affairs?
CHURCH RENTS SPACE TO SCHOOL

- Church allows third party to use church property for a school.
  - Rents space
  - Allows rent free
  - Written rental and relationship agreement
  - Preserve name rights
  - If third party has government funding, no church services
  - Third party corporation
CHURCH CREATES; OTHERS MANAGE

• Church creates school, owns property, leaves management to another group
  • Is school Episcopal? NAES: “Christian communities whose missions integrate spiritual formation into all aspects of the educational experience.”
  • Document relationship
  • Separate corporation if church does not have control

• Preserve name rights
CLERGY DISCRETIONARY FUND

• Brian has covered this
• Episcopal Church Manual of Business Methods in Church Affairs –
Canon Law – National and Diocesan Canons

- General Convention/Diocesan Convention rules of order
- How the church operates – our legal operations manual
- Ecclesiastical Discipline
- National C&C can be found online
- and ordered in hard copy and/or CD formats from
  http://www.churchpublishing.org/general_convention/
Diocesan C&C

Can be found at our website under “Resources” at:


This is a PDF that can be downloaded and saved to your computer. You can also print a copy. We are no longer providing books due to the high costs of printing.
LEGAL RESOURCES...

- Nancy Cohen, Chancellor;
- Steve Kottmeier, Vice chancellor
- Diocesan church attorneys
- Constitutions and Canons Committee members.
- Local attorneys (may be members of congregation)
- Refer questions to Parish Legal Counsel, Chancellor, Vice-Chancellor on all legal matters.
James Booth

Risk Manager for the

Diocese of El Camino Real
Property and Liability Coverage

- Guide One is our insurance carrier for all lines of coverage to include property, automobile, general, umbrella, directors and officers, employment practice liability and sexual misconduct coverage.

- The Cutler Insurance Agency is our insurance broker. Kristen Bethel is our account representative at the Cutler Insurance Agency. Kristen@cutlerinsurance.com / 800.843.6054

- Summary of Insurance Coverages – Handout
Employee Benefits

- New Employee Memorandum – 2016 Monthly Premium Costs (Handout)
- Medical, RX – Medical Trust Plans (Handout)
- Vision – Eye Med (Handout)
- Dental – Humana (Handout)
- Long and Short Term Disability (LTD/STD) – Unum
- Long Term Care Insurance (LTC) - Unum
- Group Term Life Insurance – 10K with Church Life and 25K with Unum
- Voluntary Buy-Up Options Available Through: Contact Risk Manager
  - Unum - LTC for Employee and Family
  - Unum – Additional Life Insurance
  - Church Life – Additional Life Insurance
Jesus Reyes

Canon for Congregational Growth and Development
One Church Many Locations

Growth & Development
What is and what isn’t congregational development?
What it’s not:

- It is not about finding the “right formula”
- It is not about internal re-organization
- It is not about bringing back our glorious past
- It is not about finding “new blood” – “vampire approach”
- It is not about increasing numbers
- It is not about “assimilating” new demographics
- It is not about political correctness
- It is not about making us feel good and relevant
- It is not about the CHURCH!!!
Congregational Development is about - Being faithful TO...

- The Gospel Message – Dwelling in the Word
- Forming Disciples – Dwelling in Community
- Sending out Apostles – Dwelling in Mission
What is Congregational Development?

Congregational Development is the application of...

- **Intentionality**
- **Passion**
- **Creative Imagination**

...to church presence in the world
Aspects we should consider in church development:

- It requires time – there are no quick fixes. There are no easy formulas.
- It requires honesty & integrity (belovedness). Personal investment.
- No guilt, no blame. It is hospitable.
- It is connected to its ministry context.
- It is dynamic.
- It is faithful.
CONGREGATIONAL DEVELOPMENT FORMATION PHASES

PHASE 1
“GATHER”

STAGE 1
“We welcome you”

PHASE 2
“TRANSFORM”

STAGE 2
Discovering my church community

STAGE 3
Discovering and exercising Leadership

STAGE 4
Living my Christian Vocation

PHASE 3
“SEND”

AREAS OF INDIVIDUAL FORMATION & DEVELOPMENT:
- SPIRITUAL
- BIBLICAL
- THEOLOGICAL
- PERSONAL DEVELOPMENT
- MINISTRY TRAINING

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We are *DISCIPLES* members of a *CHURCH* called to transform our *WORLD* for the benefit of the *KINGDOM OF GOD*
Communication Tools

Weekly Diocesan Newsletter: *Along the King’s Highway*

- Story deadline is Wednesdays at 6 pm
- Please limit submissions to 250 words

Our Website: [www.realepiscopal.org](http://www.realepiscopal.org)

Social media:
- ECR Facebook page
- Twitter page (@realepiscopal is our ID)
COMMUNICATIONS SUPPORT TO CONGREGATIONS

- Visits to churches to assist with challenges (websites, newsletters, social media, PR)
- Workshops -- Winter Conference, website forum
- Cover unique news & feature stories that have diocesan interest and can inspire others
- Consulting on media-related strategies and concerns
LISA BENNETT
DEVELOPMENT
CONSULTANT
DEVELOPMENT/FUND RAISING

- CAPITAL CAMPAIGNS
- PLANNED GIVING
- LEGACY SOCIETIES
- ENDOWMENTS
HOME
STRETCH...
GENERAL DIOCESAN INFORMATION

• Diocesan Organization
  • Board of Trustees
  • ECR Strategic Plan
• Key Dates and Timeline for Action
  • Diocesan Training/Events
  • Who to Call/Contact

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DIOCESAN ORGANIZATION AND STRUCTURE

BISHOP MARY GRAY-REEVES

BISHOP’S STAFF

- JESUS REYES – CANON FOR CONGREGATIONAL DEVELOPMENT
- BRIAN NORDWICK – CANON FOR ADMINISTRATION AND FINANCE
- MARY BETH POWELL – ADMIN. ASST.
- TIFFANY MARTIN – ACCOUNTANT
- ELROND LAWRENCE - COMMUNICATIONS

CONSULTANTS

- LISA BENNETT – DEVELOPMENT OFFICER
- JAMES BOOTH – RISK MANAGEMENT
Organizational Chart of The Episcopal Diocese of El Camino Real

- All Elected by Convention
  - BISHOP
  - BOARD OF TRUSTEES
  - STANDING COMMITTEE

General Convention Deputation
Diocesan Structures under the Bishop

**Commission on Ministry**
- 8 Elected by Convention (4 Lay/4 clergy)
- 8 Appointed by the Bishop (4 Lay/4 Clergy)

**Stewardship Commission**

**Communications Commission**

**Personnel Commission**

**Clericus**

**Mission Commission**
- 6 Elected by Deaneries (2 each)
- 4 Appointed by the Bishop

**Commission on Children & Youth**
- 9 Elected by Deaneries (3 each)

**Board of Examining Chaplains**

**Congregational Transformation**

**Communications Commission**

**Personnel Commission**

**OnRamp**

**Clergy Conferences**

**Episcopal Schools**

**By Invitation**

**Diocesan Staff**
- Canon for Administration
- Canon for Cong. G. & Dev.
- Administrative Assistant
- Accountant
- Communications

**Bishop’s Funding Council of Advice**

**By Invitation**

**Children & Youth**

**Ecclesiastical Discipline**

**Priest in Charge, Vicars, Deacons & Chaplains**

**Elected by Convention**

**Appointed by the Bishop**
Diocesan Structures under the BOT

With the exception of Finance Committee, SMUM, ECW and Cursillo, all other members of committees are directly appointed by the BOT.
DIOCESAN CONVENTION

BISHOP
President of Convention

BODIES SERVING CONVENTION

Resolutions Committee
Const. & Canons Committee
Nominating Committee
Deaneries
Parishes
Missions

Secretary
Chancellor
Treasurer
& Other
Convention Officers

General Convention Deputation

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Vision of the Diocese of El Camino Real

We, the Episcopal Church along the historic El Camino Real, strive to be a resilient and dynamic Gospel presence, empowering people to lead faithful lives in a rapidly changing world.

We are living in to it with the following groups/endeavors:

• Congregational Transformation Project - Intergenerational/Intercultural Ministry
• CERT – Conference Education Resource Team – Christian Formation
• Bishop’s Appeal/Capital Campaign/Wellness Initiative
• Salinas move – Sargent House
• Partnership Commission – Local community and international.
• Communications Commission
• Stewardship Commission
KEY DATES/TIMELINE FOR ACTION

• **March 15th of each year**: Parish/Mission Officers and Delegates/Alternates Forms – both sent to Diocesan Office

• **March 1st / April 1st of each year**: Parochial Reports due to National Church (online filing) and copy to the Diocesan Office

• **September 1st of each year**: Church Financial Audits/Reviews copy due in Diocesan Office (for previous year’s financial records)
KEY DATES/TIMELINE FOR ACTION

- Congregation Annual Meeting – Jan/Feb annually, and session one may be held the previous fall after October 15th.
  - Election of Officers/Delegates and Alternates to Convention
- Stewardship – year round – annual campaign in Fall
- Diocesan Convention – annually the end of October or early November
- Annual Congregation Review - Mutual Ministry Review
- Staff Evaluations - Annually
DIOCESAN EVENTS/TRAINING

- CLERGY CONFERENCE
- WINTER / SPRING CONFERENCES
  - 3rd Saturday in January
  - 3rd Saturday in May
- SAFE CHURCH (CHILDREN/PEOPLE)
- ANTI-RACISM
- EUCHARISTIC MINISTER/VISITOR
WHOM TO CALL/CONTACT...

- SHEET WITH ALL CONTACT INFO INCLUDED
- DIOCESAN DIRECTORY – ELECTRONICALLY UPDATED AND SENT TO CHURCHES YEARLY
- TAKE ADVANTAGE OF THE RESOURCES THAT ARE AVAILABLE TO YOU – MANY OF THEM IN THIS ROOM
- NO NEED TO REINVENT THE WHEEL
- SHARE WITH ONE ANOTHER IN YOUR DEANERY
- NO QUESTION SHOULD GO UNANSWERED – IF WE DON’T KNOW, WE’LL FIND OUT AND GET BACK TO YOU
QUESTIONS & ANSWERS