



**Customary of the
Diocese of Dallas**
The Rt. Rev. George R. Sumner
Bishop of Dallas

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Customary of the Diocese of Dallas

I. BISHOP'S FOREWORD

Dear friends,

Greetings in Christ.

The gospel is about grace, not law, and we as leaders in the church have as our main purpose the proclamation and celebration of that gospel.

So why a customary? The first reason is that, as I Corinthians tells us, our God is a God of order. Secondly, we want to make sure that our ministry has no scandal or impediment. Thirdly, I Timothy tells us that 'the laborer is worthy of his wages', in other words, fairness and thriving are goals for our common life as the ordained.

This document continues to evolve. I welcome any feedback.

Peace,

The Right Reverend Dr. George R. Sumner
Bishop
June 2019

II. THE MINISTRY

A. Of Policies Affecting the Clergy Generally

1. Professional Ethics

- a. The relationship of members of the clergy with fellow clergy and with the laity must be of the highest moral and professional character. As members living and working in a Christian community, we must realize that our behavior is judged by a higher standard than is customary in the secular world and our colleagues and laity have the right to expect from us fidelity to our vows of ordination: that we will do our best to pattern our lives “in accordance with the teachings of Christ.”
- b. Every member of the clergy made a solemn declaration on the occasion of his/her Ordination to conform “to the doctrine, discipline, and worship of The Episcopal Church.”
 - No member of the clergy of this Diocese shall officiate at services not authorized by the Book of Common Prayer without specific authorization of the Bishop, in writing.
 - No member of the clergy will represent as doctrine of this Church what cannot be founded on Scripture or is contrary to the official teaching of this Church as it has been articulated by General Convention.
- c. No person will be denied rights or status in the Church by reason of “race, color, ethnic origin, national origin, marital or family status, sex, sexual orientation, gender identity or expression, disabilities or age, except as otherwise specified by Canons.” (TEC Title 1, Canon 17, Sec 5)
- d. No member of this Church may be deprived of Holy Communion, except as provided by the “Disciplinary Rubric” (*The Book of Common Prayer*, p. 409).
- e. No member of the Clergy, having resigned a cure, shall revisit or participate in events of that cure except by invitation of the Rector/Vicar, or in the event of a vacancy in this office, of the Senior Warden, and of the Bishop. It is inappropriate for resigned or retired clergy to conduct services or to consult with members of a cure they have left without the specific invitation and knowledge of the leadership of that cure and of the Bishop.
- f. Conflict of Interest Policy. The purpose of this policy is to protect the interests of the Episcopal Diocese of Dallas (Diocese), parishes and other organizations within the Diocese, and parishioners. Conflicts of interest, at any level, create an appearance of impropriety and an opportunity for undue influence and potential exploitation, all of which undermine the integrity of the Church, its clergy and our Christian mission. (See APPENDIX A: CONFLICT OF INTEREST POLICY on pg. 32)

2. Clergy Data Sheets

Information on the basic life facts regarding the members of the clergy in this Diocese are essential to the Bishop in his role as Chief Pastor. Personnel data sheets for this purpose are to be obtained through the Office of the Bishop. They should be filled out and returned promptly and reviewed periodically for updating. All such forms are the property of the Diocese and will be secured under lock and key.

(See APPENDIX A: CLERGY DATA SHEET, pg. 30)

3. Of Clergy Celebrating or Officiating in a Diocese not Their Own

- a. *Clergy of this Diocese Celebrating or Officiating Outside the Diocese of Dallas.* Although not required by Canon, it is the policy of the Bishop that Clergy of this Diocese invited to celebrate, officiate, or preach in another Diocese obtain the permission of the Bishop of that Diocese before proceeding to do so. Clergy so invited need not obtain the permission of the Bishop of Dallas to do so.
- b. *Clergy of other Dioceses invited to Celebrate or Officiate at Services in the Diocese of Dallas.* It is the policy of the Bishop of Dallas to provide a hospitable welcome to other Bishops or Presbyters of the Episcopal Church to participate in the services of the congregations of this Diocese.
- c. *Presbyters invited by the Rector or Vicar of a congregation* need not obtain permission of the Bishop of Dallas to celebrate, officiate or preach at a congregation of this Diocese. However, the Rector or Vicar is expected to write to the Bishop informing him of the invitation and occasion.
- d. *Bishops invited to celebrate, officiate or preach within this Diocese* must obtain permission of the Bishop of Dallas *before* being invited to participate in services. This is a requirement of TEC Title III, Canon 12, Sec 3(e) of the Canons of the Episcopal Church. The inviting Rector or Vicar must request permission of the Bishop of Dallas in writing prior to extending the invitation, and the Bishop's permission will be sent in writing to the invited Bishop.
- e. *Ordained members of the Clergy not canonically resident in the Diocese of Dallas* may not serve in any congregation of this Diocese for an extended period (longer than 60 days) without the written permission of the Bishop of the Diocese. Requests for this permission should be directed to the Canon to the Ordinary, and consultation with him about the reasons for this request is a prerequisite for consideration of the request.
- f. Ordained clergy not in communion with this church may preach with the Bishop's permission but may not preside at sacramental services, although they may assist similar to the laity.

4. Letters Dimissory

- a. When members of the clergy accept a call to and relocate in a new diocese, Letters Dimissory should be requested to be sent immediately after taking up residence and being received by the Bishop of the new diocese.
- b. Letters Dimissory for members of the clergy accepting a call as a rector or vicar and relocating in this Diocese are accepted immediately.

- c. Members of the clergy accepting a call as full-time assistants or associates in and relocating to this Diocese must wait one full year before their Letters Dimissory can be accepted. They should apply for a license from the Diocesan Bishop.
- d. Retired and non-parochial clergy will remain canonically resident in the diocese from which they come.
- e. The issuance and acceptance of Letters Dimissory may be delayed by the Bishop for cause.
- f. Letters Dimissory will only be accepted for those who are called into the diocese to serve a full-time cure.

5. Vacation Policy

Clergy are entitled to one month of vacation for every calendar year's work and ministry. It is to be taken in consultation with the vestry. Should a priest leave or begin his/her cure before completing a calendar year, he/she may expect only part of the vacation in proportion to the time served.

6. Reports

- a. *Clergy in Non-Ecclesiastical Employment.*

Members of the clergy in non-ecclesiastical employment must submit in writing a report of their activities annually, the form for which will be found in APPENDIX G: ANNUAL REPORT TO THE BISHOP, (Non-parochial and Licensed Clergy) pg. 39)

- b. *Clergy in the Armed Services.*

Members of the clergy canonically resident in this Diocese and serving in the Armed Services are required to submit written reports to the Bishop Suffragan for Federal Ministries, in a form provided by him/her. Copies of these reports should be submitted to the Bishop of the Diocese.

- c. *Annual Parochial Reports.*

Annual Parochial Reports must be completed and received by the Office of the Bishop not later than 1 March of each year. The clergy in charge of congregations are reminded that the Canons place the responsibility for delivering this report on them, as well as the Vestry.

- d. *Annual Audits.*

An audit of the books of the congregation is required annually by Canon I.7.1(f)-(g) and must be submitted by 1 September of each year. A guide for use by congregational audit committees is available from the Diocesan Treasurer. Vestries and the clergy in charge of congregations are reminded that these audits protect them, as well as the congregation itself.

7. Clergy Supply Policies & Procedures

- a. The Diocese through the Canon to the Ordinary maintains a list of clergies available for supply. The minimum remuneration as of June 17th, 2019 is as follows:

One Principal Sunday Service	\$ 200.00
Two Sunday Services (one day)	225.00
Three Sunday Services (one day)	250.00
Weekday celebration	75.00
Meetings	50.00
- b. The congregation is expected to reimburse the supply priest for mileage in addition to the schedule above. For information on the current rate, go to www.irs.gov to get current IRS mileage rates.

8. Ministry Funds

The Fund that most clergy and churches are accustomed to establish as “Discretionary Funds” are now known and described as “Ministry Funds.” (See APPENDIX L: MINISTRY FUNDS POLICY, pg. 55)

9. Sexual Misconduct

It is the policy of the Diocese of Dallas that sexual misconduct of any kind by any ordained person will not be tolerated.
(See APPENDIX H: SEXUAL MISCONDUCT POLICY, pg. 41)

10. Clergy Marital Distress

It is important that members of the clergy model for their people the values and principles which they proclaim. Nowhere is this more important than in the homes of the clergy. The clergy of this Diocese are encouraged and expected to give due attention to their spouses and children. When marital discord arises, they are expected and encouraged to lay the matter before a competent pastor, and to seek the ministrations of the Church and other professionals that “unity may overcome estrangement, forgiveness heals guilt, and joy conquer despair.” The Bishop, as chief pastor, and the Canon to the Ordinary stand ready to assist clergy and their families in any and every way in this matter.

11. Clergy Bi-Annual Meeting with Bishop

Clergy in full-time employ will meet with the Bishop every other year to evaluate and set goals for the coming year. The Bishop’s Assistant will contact you to schedule during your birthday month. Birthdays in July and August will be schedule prior to July or following August.

12. Parental Leave

The Bishop and the Standing Committee recommend that all congregations adopt a Parental Leave Policy that provides (at a minimum) unpaid Parental Leave, without loss of seniority or benefits, for full-time (min. 30 hrs/week) and part-time (over 20 hrs/week) exempt and non-exempt employees who have completed more than twelve (12) consecutive months of employment. Eligible employees should be allowed up to twelve (12) weeks of unpaid Parental Leave.

An eligible employee should be allowed to take unpaid Parental Leave for one of the following reasons:

- a) For the purpose of the birth of a child
- b) For the placement with the employee, by adoption or by Court Order, of a son or daughter up to the age of 18 years.

An employee should be allowed to elect to use available paid time off (sick leave, earned vacation and personal days) during any portion of the unpaid Parental Leave.

An employee should be required to give at least two (2) weeks advance notice of the anticipated date of departure and of the anticipated date of return, or as soon as such notice is practicable.

Coverage under group health, dental, life and disability insurance plans (obtained by congregations through the Diocese) will continue during Parental Leave at no additional cost of the employee. The employee is responsible to timely pay the employee's normal contribution, if applicable, toward health, dental, life and disability insurance benefits.

Benefits such as vacation, sick leave and personal days should accrue only during the paid portion of any such Leave, but not during any portion which is unpaid.

If an employee does not or cannot return after an approved Leave, the employment of the employee should be subject to termination.

Concerning Short Term Disability Benefits Available from CPG:

Female clergy currently having pension assessments paid to the Church Pension Fund:

- Are typically eligible for short-term disability due to the birth of a child
- The employer is paid 70% of the cleric's reported compensation for 12 weeks from the date of delivery (complications may extend the disability period up to a maximum of 24 weeks)
- Not available for adoptions or male clergy

Female lay employees that are enrolled in CPG's IRP (Income Replacement) program may also be eligible for some benefits after the birth of a child. Please contact the Missioner for Diocesan Services for more information.

13. Sabbatical Leave and Doctoral Education

- a. A sabbatical leave is intended to provide active, full-time clergy, the opportunity to be renewed through additional study and reflection after they have served seven (7) consecutive years in one Cure. This applies to Rectors/Vicars and also to Assistants by whatever title known. Typically, such study will be focused in an area of study that enhances one's ministry in the parish or the Church at large. Below are guidelines to help clergy and their Vestries in planning for a fruitful sabbatical leave that will be beneficial both for the individual and the parish.

- b. **Submission of a Plan.** Sabbaticals are opportunities for in-depth spiritual and intellectual growth for the clergy. As such, one should have a plan that describes the purpose of the study, a schedule of opportunities, and an anticipated outcome of the study.
- c. **Financial Considerations.** It is important for the individual clergy person to work with his/her Vestry in planning for the financial requirements of the leave. As a rule, the cost of the sabbatical is divided as follows: one-third of the cost is absorbed by the individual, one-third by the parish and one-third by the diocese. The diocese portion is given as a grant which must be requested in writing by the individual. This request must be made to the Office of the Canon to the Ordinary in a timely manner and will be granted as funds are available.
- d. Vestries and clergy are encouraged to plan ahead for a sabbatical and establish a fund for the future leave of their clergy. A certain amount may be set aside each year for the sabbatical reducing the financial impact at the time the sabbatical is taken.
- e. In addition to the normal compensation paid to the clergy person, the parish will need to plan for the normal expenses of supply clergy should they be needed during the sabbatical leave period.
- f. There are some institutions and foundations that make grants for continued studies for clergy and these should be contacted by the individual clergy person during the planning process.
- g. **Length of Sabbatical Leave.** In most instances the normal length of a sabbatical is three (3) months. This does not include the clergy vacation time (one month) and continuing education leave time. Together, the time can be significant for developing and completing a particular project. Of course, Vestries may lengthen the time should they support additional leave for their clergy.
- h. In lieu for a sabbatical, clergy may elect to receive financial support for doctoral education. This is a one-time election and must be made in writing to the Bishop.
- i. **Final Notes**
 - Sabbaticals should not be granted in anticipation of termination of employment.
 - For those requesting a grant from the diocese, a written plan must be submitted with a grant request and, a report must be submitted to the Office of the Bishop upon return from the sabbatical.
 - Planning for a sabbatical should begin at least six (6) months prior to the beginning of the sabbatical leave.

14. Insurance

All parochial clergy working 1500 hours per year shall have health, and dental insurance provided to them and their family by the parish. The insurance should be that offered through the Diocese of Dallas by The Episcopal Church's denominational health plan. In addition, the clergy should be covered by at least \$40,000 of Group Life insurance with AD&D.

B. Of the Episcopate

1. Chief Pastor

"In the early church there were two regular occasions for the ministry of proclamation and teaching: i) the process of Christian initiation culminating in baptism (catechesis), and ii) the Sunday liturgy. As the 'first citizen' and chief teacher the bishop presided at both the baptismal and Eucharistic liturgies, the two public actions in which the church most definitively enacted its identity.

"Though it is impossible today for the bishop to preside at every baptism or Sunday liturgy, the symbolic significance of these pastoral roles and their roots in the worshipping community are a good place to start rethinking the vocation of a bishop and the bishop's essential connection with the local congregation.

"Finally, the bishop's role as a leader and an administrator grow out of and are dependent upon the bishop's prior pastoral roles associated with teaching and presiding at the sacraments.

"The form of church government symbolized in the bishop's presidency of the Eucharist is collegial and conciliar in character. This model should apply to all the bishop's leadership functions.

"The collegial character of the bishop's relationship with the clergy of the diocese is established symbolically in the ordination of a priest, when the other presbyters present at the ordination join the bishop in laying hands on the ordinand. That same collegiality is also implied in the bishop-elect's promise to sustain and take counsel with fellow presbyters in the diocese." - from The Ministry of Bishops: A Study Document, authorized by the House of Bishops of the Episcopal Church, 1991.

"It is the bishop's prerogative, when present, to be the principal celebrant at the Lord's Table, and to preach the Gospel." (BCP, p. 354)

2. Episcopal Visitation

TEC Title III, Canon 12, Sec. 3 (a) (1), provides that:

"A Bishop Diocesan, Bishop Coadjutor, Bishop Suffragan, or Assistant Bishop of the Diocese shall visit the Congregations within the Diocese at least once in three years. Interim visits may be delegated to another Bishop of this Church. (1) At every such visitation the visiting Bishop shall preside at the Holy Eucharist and at the Initiatory Rites, as required, preach the Word, examine the records of the Congregation required by Canon III.9.6(c), and examine the life and ministry of the Clergy and Congregation according to Canon III.9.6."

- a. The Bishop will make individual visits to parishes and missions on special occasions as each is able.
- b. During a Visitation of the Bishop, the services are under his direction.

- c. Undesignated offerings taken during the Bishop's Visitation are to be designated for the Bishop's Ministry Fund and should be forwarded to the diocesan office within the week following the Visitation.
- d. Normally, the visitation schedule is established at least six months to a year in advance. This requires clergy to make local needs (e.g., anniversaries, special celebrations, etc.) known far in advance.
- e. The Bishop's Assistant will send notification of the visitation to the Rector/Vicar of each Parish or Mission in a timely fashion. In addition, the Assistant will request information from the Rector/Vicar on a form provided about the life and work of the congregation, to be provided to the Bishop(s).
- f. Confirmands are invited to write a letter to the Bishop at least one week prior to the visit in which they share what they have learned and how they have grown spiritually during their preparation.
- g. The Rector, Vicar, or Priest-in-Charge will have the Parish records and the Safe Church Training records available for the Bishop's inspection at his visitation.

3. Canon to the Ordinary

- a. The Canon to the Ordinary is tasked by the Bishop to assist him in the administration of his Office, to provide for clergy development, clergy deployment and pastoral relations. The clergy of the Diocese always have priority of access to the Bishop but often matters taken up with the Bishop will be referred to the Canon to the Ordinary.
- b. Parishes and missions must inform the Bishop of the Diocese as soon as possible after the incumbent member of the clergy has submitted his or her resignation. In no case should a search for pastoral leadership begin until consultation has been had with the Canon to the Ordinary.
- c. Parishes and missions seeking interim clerical ministry following a resignation and during the search process must consult with the Canon to the Ordinary before engaging such an interim minister.
- d. Parishes and missions must consult with the Bishop and Canon to the Ordinary before beginning the search process. Parish in search will receive a list of names for consideration from the Canon to the Ordinary. Other names must be shared with the Canon for appropriate background check and vetting.
- e. Parish hiring associate clergy must inform the Canon to the Ordinary prior to an offer or negotiation of terms.
- f. Parish should share all letters of agreement for clergy with the Canon to the Ordinary.
- g. Clergy desiring to continue their education, pursue sabbaticals, or consider their career opportunities and options should consult with the Canon to the Ordinary.
- h. Clergy experiencing difficulty with the parish should consult with the Bishop or the Canon to the Ordinary at the earliest possible opportunity.
- i. Clergy considering retirement should consult with the Canon to the Ordinary well in advance of the contemplated date of retirement.

4. The Customary

The Canon to the Ordinary will be responsible for the distribution of the Customary to all new clergy and to review the information contained therein with them in order to orient clergy new to this Diocese.

5. Clergy Conferences

Clergy Conferences will be scheduled at regular times to promote unity within the Diocese. Each conference will include time for the clergy to interact and discuss matters of concern to the spiritual life of the Diocese with the Bishop. Usually, there will be two conferences. All canonically resident clergy are expected to attend unless excused by the Bishop.

C. Of the Presbyterate

1. Of Rectors/Vicars

- a. The Canons protect the rights and privileges of incumbent rectors/vicars. These legal rights must be respected for the sake of good order.
- b. Members of the clergy resident in this Diocese may function liturgically in the cure of another only with the permission of the rector of that cure.
- c. Upon the resignation or death of the Rector or the dissolution of the pastoral relationship between a Rector and a congregation, and “under such conditions as the Bishop and Vestry shall determine,” an assistant may continue to serve the congregation if requested by the new Rector/Vicar.
- d. The exercise of common respect and courtesy require protecting the ministry of a successor. Should a request be made by a parishioner to a former rector/vicar to perform a marriage, funeral, baptism, etc., permission to function must be sought from and granted by the incumbent rector/vicar, or in the case of a vacancy in that office, of the Canon to the Ordinary. Additionally, a member of the clergy so invited should consult with and obtain permission of the Canon to the Ordinary.
- e. Former parishioners may well continue to call upon a beloved member of the clergy for ministerial functions long after his/her departure. But for the sake of his/her former parishioners and for the sake also, of the new rector/vicar who is trying to establish his/her relationship with the people, the former incumbent will refrain from accepting these requests. It is painful to make this kind of sacrifice but ethically he/she is obliged to say No and thus further strengthen his/her successor’s pastoral relationship and ministry.

2. Of Disputes between Vestry and Rector/Vicar

- a. Rectors/vicars may not be dismissed by their congregations without the consent of the Bishop. (Diocesan Canon 20.1.)

- b. If dispute cannot be resolved, either or both parties must present the matter to the Bishop. If an amicable resolution is not arrived at within six calendar months, the Bishop will summon both parties to present their case to the Standing Committee. After the parties have been heard, the Bishop will consult with the Standing Committee. After this consultation, the Bishop will issue an order which will be observed by the rector/vicar and the vestry of the congregation. (Diocesan Canon 20.2-20.4)

3. Of Assistant Ministers - Curates

- a. Rectors and vicars may call a curate (the term for an assistant minister by whatever title he/she may be known locally) on the condition that:
 - i) The vestry of the parish gives its permission for the position;
 - ii) The Bishop is notified in advance so that names may be submitted by him for consideration by the rector;
 - iii) The rector consults with the Bishop before issuing the call or appointment. (TEC Title III, Canon 9, Sec 3(d))
- b. Curates function at the pleasure of the rector or vicar.
- c. Curates may not be dismissed until the rector or vicar has consulted with the Bishop (Diocese of Dallas Canon 21).

4. Of Diocesan Curates - Newly Ordained

- a. All newly ordained deacons and priests working at least half-time in parish ministry and related fields are under the supervision of the Bishop, acting through the Canon to the Ordinary.
- b. Generally, each ordinand will serve the first two years of his/her ministry as curate under the mentoring of an experienced rector. The rector and curate are expected to cooperate with the Bishop, and follow the guidelines and policies set forth by the Bishop's Office and Commission on Ministry through letters of agreement. The cost of the program is shared between the parish and the Diocese and is negotiated through the Canon to the Ordinary.
- c. The newly ordained will be expected to attend regular meetings for training and consultation as prescribed by the Canon to the Ordinary. This time away from the parish is to be considered as a part of their work and is not to be counted against routine time off or vacation time.

5. Of Clergy in Non-Ecclesiastical and Non-Parochial Employment

For the purposes of this article, "non-ecclesiastical employment" refers to clergy who are not engaged in one or more of the following: i) parochial ministry as the principal form of ministry; ii) full-time chaplaincy of the Armed Forces, Veteran ~ Hospitals, secular or church related hospitals, or church related schools; iii) full-time teaching in a seminary or institution of higher learning where sacerdotal functions are also carried out as an integral part of such teaching. Non-parochial refers to clergy who are not engaged in ministry in a parish.

a. **Conflict of Interest Policy**

The purpose of this policy is to protect the interests of the Episcopal Diocese of Dallas (Diocese), parishes and other organizations within the Diocese, and parishioners. Conflicts of interest, at any level, create an appearance of impropriety and an opportunity for undue influence and potential exploitation, all of which undermine the integrity of the Church, its clergy and our Christian mission. (See APPENDIX A: CONFLICT OF INTEREST POLICY on pg. 32)

- b. Members of the clergy who plan to enter non-ecclesiastical employment must consult with the Canon to the Ordinary concerning the provisions of TEC Title III, Canon 9.3 (e), in order to satisfy the requirements of that Canon and protect themselves.
- c. Members of the clergy who are already engaged in non-ecclesiastical employment must report annually to the Bishop.
- d. Members of the clergy in non-ecclesiastical employment who are licensed, or desire to be licensed to function in this Diocese, must render to the Bishop a total of six modules of service (a module being defined as four hours of time) each year as a condition of their license. The Bishop, acting through the Canon to the Ordinary, may assign these modules to the member of the clergy as needed. The modules are not cumulative (i.e., do not carry over from year to year). No penalty accrues to the member of the clergy if the six modules are in fact not assigned in any given year.
- e. Notwithstanding the above, clergy in non-parochial employment must complete an annual report to the Bishop.

6. Of Clergy in the Armed Forces

- a. Members of the clergy canonically resident in this Diocese and serving in the Armed Services are required to submit written reports to the Canon to the Ordinary for Federal Ministries, in a form provided by him/her. Copies of these reports should be submitted to the Bishop of the Diocese.
- b. Members of the clergy of this Diocese are encouraged to give consideration to serving as chaplains of the Armed Forces and will be supported to do so especially as chaplains in the reserve forces. The benefits of serving as a reserve chaplain accrue not only to the individual, but to the Diocese, the Church as a whole, and to the Armed Forces. Personal benefits can be substantial over time. But the parish and the Diocese also benefit since continuing education and a breadth of ministerial experience are key elements in the military chaplaincy.
- c. Members of the clergy desiring to seek endorsement as chaplains in the Armed Forces should consult with the Bishop or Canon to the Ordinary before proceeding to apply either for endorsement or for a commission as a chaplain.

7. Of Clergy Non-Resident in this Diocese

Members of the clergy not resident in this Diocese must be given specific permission by the Bishop to function liturgically at services in this Diocese.

- a. Members of the clergy who may function on an ongoing basis will be issued a license by the Bishop to do so.
- b. Members of the clergy who will function on a one-time only or a limited basis will be given a letter of permission by the Bishop.
- c. Requests for permission should be directed to the Canon to the Ordinary.

D. Of the Diaconate

1. Titles - Terminology

- a. All persons ordained to the order of Deacons may be addressed in writing as “The Rev.” and in both oral and written address as “Deacon.” (For example: Sue Jones is addressed “The Rev. Sue Jones” in writing, and “Deacon Jones” in speech or writing.)
- b. When a distinction is to be made among deacons based on the nature of their vocation, all deacons are referred to simply as “deacon,” while those who will soon be ordained to the presbyterate may be qualified by the term “transitional deacon.” It is inappropriate to speak of “permanent” or “vocational” deacons.

2. Scope of Ministry

- a. Deacons serve under the direction and supervision of the Bishop and may serve only in a manner and in such places as the Bishop designates. When assigned to a congregation in this Diocese, the deacon works under the supervision of the member of the clergy in charge thereof.
- b. Deacons desiring to relocate to another diocese may do so only with the consents of both the Bishop of this Diocese and of the bishop of the diocese to which the deacon desires to relocate.
- c. Deacons are not authorized to be in charge of a congregation in this Diocese.
- d. Deacons are not authorized to officiate at the rite of Holy Matrimony in this Diocese.
- e. Deacons are not authorized to be chaplains of the Armed Forces or the Veteran’s Administration hospitals.
- f. Deacons are models of Christian service in and to the world.
- g. So called “Deacon’s Masses” are not authorized.

3. The College of Deacons

The deacons of this Diocese shall meet together collegially on a regular basis. For administrative purposes, the College of Deacons is under the guidance and coordination of the Archdeacon.

4. Deacons in the Liturgy

The ministry of the Deacon is a ministry of service. This ministry has a dignity and integrity of its own, representing as it does the ministry of Jesus Himself - “I am among you as one who serves.” (Luke 22.27)

With respect to the liturgy, the role of the Deacon is symbolic of their larger ministry. The Prayer Book rubrics make clear that the Deacon functions in four areas:

- a. Deacons read the Gospel. Since they represent the servant ministry of Jesus Himself, it is historically and theologically appropriate that they “proclaim” the living Word of Jesus in the liturgy. *Whenever a Deacon is present, he or she should read the Gospel lection.*
- b. Deacons set the Table. This action recalls the account of the institution of the office in the Acts of the Apostles and symbolizes the “practical” aspects of this Order. (The Prayer Book permits a priest to carry out these two functions “in the absence of a deacon,” p.354. In addition, of course, Deacons may be assisted by acolytes in the setting of the Table, p. 406).
- c. Deacons may read the Prayers of the People. The Deacon is ordained to “interpret to the Church the needs, concerns, and hopes of the world.” (p. 543).
- d. The Deacon dismisses the People. This is more than a perfunctory conclusion to the service. It symbolizes again the “between-altar-and-world” character of diaconal ministry.

E. Of Licensed Lay Ministers

1. General Policies

- a. Applications for a license to serve as a Lay Minister in any of the several areas specified below may be made by confirmed adult communicants of this Church in good standing. The application must be approved by the Rector/Vicar of that person’s congregation.
- b. Potential Licensed Ministers make application in writing to Bishop, copying the Canon to the Ordinary, stating the intended role and qualifications. A written statement of support from the parish Rector/Vicar is also required.
- c. Licenses for any Lay Ministry are not transferable from congregation to congregation:
 - i) Lay Ministers duly licensed by the Bishop may function at diocesan events when requested to do so; and may exercise their ministries temporarily in any other congregation in this Diocese when specifically requested to do so by the member of the clergy in charge thereof.
 - ii) Lay Ministers permanently relocating to a congregation other than the one in which they were duly licensed must make application for a new license.

2. Of Pastoral Leaders and Worship Leaders

- a. Licenses for Pastoral Leaders/Worship Leaders are issued for a period up to three years, beginning with the first Sunday of Advent following application.
- b. Licenses may be renewed on the following conditions:
 - i) The Pastoral Leader/Worship Leader remains proficient in the conduct of services, and active in other service to the Church;
 - ii) The Pastoral Leader/Worship Leader has been regular in submitting reports of his/her activity to the Rector or Vicar;
 - iii) The Pastoral Leader/Worship Leader’s application is endorsed by the clergy in charge of his/her congregation.

3. Of Eucharistic Ministers and Eucharistic Visitors

- a. Licenses for Eucharistic Ministers (EM)/Eucharistic Visitors (EV) are issued for up to three years.
 - i) Eucharistic Ministers assist in administering the elements at a Celebration of the Holy Eucharist;
 - ii) Eucharistic Visitors take the Sacrament to members of the congregation who were unable to be present by reason of illness or infirmity following Celebrations on a Sunday or other Principal Feast.
- b. Licenses may be renewed on the certification by the member of the clergy in charge of his/her congregation that:
 - i) The EM/EV has been active in the discharge of his/her duties;
 - ii) The EM/EV has attended a diocesan training event, or otherwise continued his/her education for this ministry under specific supervision of the member of the clergy in charge;
 - iii) The parish continues to have need of his/her services.
- c. Eucharistic Ministers may function only under the direction of the member of the clergy in charge of the congregation. EMs do not take the place of the ministries of priests or deacons, either in the liturgy or in pastoral visitations. (Rubrics, BCP, p. 408; see also TEC Title III, Canon 4, Sec. 6)
- d. The number of Eucharistic Ministers/Eucharistic Visitors who may be licensed for a congregation is not fixed, and may be determined by the member of the clergy in charge thereof the number should be guided by the following considerations:
 - i) the number reflects the actual need of the congregation (rather than the number of persons seeking to be licensed);
 - ii) those licensed have frequent opportunity to exercise their ministry (rather than doing so very infrequently);
 - iii) those licensed are faithful in the exercise of their ministry (rather than being haphazard or undisciplined about it).

4. Of Other Lay Ministries

- a. **Lectors** are persons trained in the public reading of Scripture in the local congregation. The member of the clergy in charge of the congregation is responsible for setting the requirements and licensing individuals for this ministry.
- b. A **Preacher** is a lay person licensed to preach in congregations of this Diocese. The license is issued by the Bishop; which license specifies the conditions which must be observed by the person so licensed. Lay Preachers function at the direction and under the supervision of the member of the clergy in charge of the congregation in which he/she is to preach. Lay Preachers must demonstrate training and proficiency in the areas specified by Canon (TEC Title III, Canon 4, Sec. 5).
- c. A **Catechist** is a lay person authorized and licensed to prepare persons for Baptism, Confirmation, Reception and Reaffirmation of Baptismal Vows under the direction of the Rector/Vicar of a congregation.

- d. An **Evangelist** is a lay person specifically commissioned and licensed to lead evangelistic ministries of a congregation under the direction of the Rector/Vicar of the congregation.
- e. Other lay ministries may be created based on local need and appropriate preparation. Use of the “Commissioning for Lay Ministries in the Church,” *The Book of Occasional Services*, pp. 179ff) is recommended for the recognition of such ministries.
- f. Members of the Order of Lay Catechists and Lay Evangelists are nominated by their priest and selected by the bishop who licenses them annually. Lay Catechists and Evangelist receive training through the Stanton Center supplemented with other courses. These orders are supported by the Canon Theologian and Missioner for Evangelism. Both orders are non-stipendiary.

5. Persons Seeking Holy Orders

- a. Persons who believe they are being called by God to serve the Church in Holy Orders should consult first with the member of the clergy in charge of their congregation.
- b. The clergy should familiarize themselves with the procedures established by the Bishop and the Commission on Ministry for persons seeking Holy Orders, which are available from the Canon for Vocations.
- c. Persons seeking Holy Orders should not enroll in any seminary or other school in a program leading to a theological degree without first consulting with and obtaining approval to do so from the Bishop.

F. Lay Employment Practices

Guidelines

1. It is suggested that the procedures found in “Guide to Human Resources Practices for Lay Employees in Episcopal Churches – Second Edition” *Church Pension Group*, be followed in all matters concerning the administration of lay employees.

2. Lay Pension

In the 96th Annual Convention of the Diocese of Dallas, the following Resolution was passed governing the establishment of Lay Pensions:

WHEREAS, the 70th General Convention of the Episcopal Church adopted Resolution #DI65a, Lay Pension Plan: The Plan provides that all parishes and missions which, under the Regulations of the Church. Pension Fund, have elected or shall elect to come into the Church Pension system shall provide all lay employees who work a minimum of 1,000 hours annually retirement benefits through participation in the Episcopal Church Lay Employees Retirement Plan (ECLERP), or in an equivalent plan the provisions of which are at least equal to those of ECLERP. Participation shall commence no later than January 1, 1993. At commencement, if the plan is a defined benefit plan, the employer contribution shall be not less than 9% of the employee's salary; if the plan is a defined contribution plan, the employer shall contribute not less than 5% and agree to match employee contributions up to another 4%. The employer may impose a minimum age of 21 years and a minimum employment period not to exceed one year of continuous employment before an employee is eligible to participate. Resolution Number DI65a provided that each diocese of the church shall

implement the resolution by Diocesan Canon or appropriate resolution. NOW, THEREFORE, BE IT RESOLVED that all parishes and missions in the Diocese of Dallas shall be subject to the terms of Resolution Number D165a and shall comply with its requirements as set out above.

3. Insurance

All full time lay employees must be offered the opportunity to participate in the health, dental and group life insurance policies offered by the Diocese of Dallas or the policies offered in the parish. The parish is not required to pay for such policies but must be consistent in following any policy of payment for all employees.

4. Parental Leave (see page 5)

III. THE LITURGY

A. General Policies

1. Standard of Worship

The standard of worship in this Diocese is *The Book of Common Prayer* (1979).

- a. All regularly scheduled services of public worship, Sunday and otherwise, shall follow the BCP (1979).
- b. One-time or short-term permission to use rites other than those provided in the BCP (1979) must be requested in writing from the Bishop, copying the Canon to the Ordinary. No long-term or perpetual permissions will be given.
- c. Celebrations of the Eucharist on a Sunday, or at regular weekday services, must follow the forms prescribed in either Rite One or Rite Two. "An Order for Celebrating the Holy Eucharist" (BCP, pp. 400-401) is not appropriate for these services, and may not be so used.
- d. When copies of all or part of any service from the Book of Common Prayer is printed in a separate form or program, there shall be appended to it either at the end (or introduced at the beginning) of the text, the following statement:

"The foregoing (*or following*) text of the service of worship contained in this program is taken from the Book of Common Prayer 1979. The Book of Common Prayer alone is of authority in the worship of the Episcopal Church. This program is provided for convenience of use on this occasion."

This statement applies to any and all portions of the services taken from the Book of Common Prayer, including weddings, burials, baptisms, confirmations, ordinations, or prayer services. Services you create for special days, such as retreats or other observances not included in the Book of Common Prayer, or services taken from or adapted from supplemental resources (e.g., *The Book of Occasional Services*) are not subject to this requirement.

2. Spiritual Jurisdiction

- a. The conduct of worship and the spiritual jurisdiction of the parish is vested, according to the Canons, in the rector (or vicar), subject to the rubrics of The Book of Common Prayer, the Canons of the Church, and the pastoral direction of the Bishop (Title III, Canon 9, Sec. 5). Matters not covered in these sources or in this customary are left to the pastoral discretion of the rector/vicar.
- b. “It is the bishop’s prerogative, when present, to be the principal celebrant at the Lord’s Table, and to preach the Gospel.” (BCP, p. 354)

3. Approved Versions of Scripture

The versions of Holy Scripture authorized for use in the services of this Church are according to TEC Title II, Canon 2. Additionally, the Bishop authorizes use of the English Standard Version.

Other versions or paraphrases are not authorized and may not be used in services of this Church.

4. Holy Communion

- a. Any baptized person who is in good standing in his/her own communion may receive Communion in our Church.
- b. Notwithstanding the statement above, we do not publicly announce that everyone can come to the Altar for Communion.
- c. No person who presents himself/herself at the Communion Rail, and who signifies a desire to receive Holy Communion, will be turned away except:
 - i) In the case that the clergy have determined that the individual is *not* baptized.
 - ii) In the case that the person is under discipline, as provided by the Disciplinary Rubrics in the Book of Common Prayer (p. 409).
- d. At an ecumenical celebration approved by the Bishop, all baptized persons who desire to do so may receive Communion.
- e. The following notice may be printed in the service bulletin:

“If you are visiting with us today, we welcome you. If you desire to receive communion on this occasion and are baptized with water in name of the Trinity, we invite you to do so. Please feel free to consult on this matter with a member of the Clergy.”

5. Communion of Children

Baptized children members of this Church may be admitted to Holy Communion, provided:

- a. The member of the clergy in charge of the congregation permits it;
- b. The clergy of the congregation have given instruction on a recurring basis to the people as a whole on the nature and reasons for the communication of children;
- c. The parents of the children specifically approve and desire the communication of their children;
- d. The parents and the clergy together instruct their children on the meaning of communion on an ongoing and age-appropriate basis.

6. Intinction

Persons wishing to intinct must allow the Eucharistic Minister to do so and communicate them.

7. The Dismissal.

The addition of the double alleluia to the dismissal is only authorized from the Easter Vigil through the Day of Pentecost.

8. Marriage Anniversary Blessings

The nuptial blessings, BCP pg. 431, may not be used as a prayer or blessing on the occasion of the anniversary of a marriage.

B. The Episcopal Visitation**1. General Considerations**

- a. The celebration of the Eucharist is the key way in which the Ministry of Christ is set forth in “As often as we break this bread and drink this cup, we proclaim the Lord’s death until his return.” (1 Corinthians 11.26)
- b. In both Baptism and Confirmation, the larger community of faith plays a significant and essential role. Both Sacraments involve the People of God in an active way in encouraging, upholding and strengthening Christian individuals.
- c. The Bishop’s visitation is an opportunity for celebrating specific forms of Christian witness and service in the local community. The clergy and people are encouraged to think of ways the Bishop might help the local community give emphasis and renewed dedication to their common work.
- d. Rectors and vicars should look upon the visitation as an opportunity to educate their people to the broader dimensions of Ministry in and of the Church. This will certainly be the case with Confirmation preparation. But this is only one avenue.
- e. A significant symbol of the relationship between Baptism and Confirmation, and of the mutual responsibility which Christians bear toward one another may be found in the following suggestion: Godparents and parents, or sponsors from the congregation stand with the person to be confirmed (or received). As the Bishop lays hands on the head of the candidate, the godparents and/or sponsors join with the priest and lay their hands on the shoulders of the candidate. This participation requires preparation and instruction, and perhaps a rehearsal.

2. General Directions:**a. Vestments:**

The bishop will wear his Mitre to process, recess, bless and absolve. He will wear his Mitre to confirm.

b. Deacons:

- i) The Bishop will be accompanied by a Deacon. In parishes where a Deacon customarily serves in the Liturgy, the resident deacon will read the Gospel and the Prayers for the Candidates (or Prayers of the People). The Bishop’s Deacon will set the Table and Dismiss the People as well as serve as the Bishop’s chaplain.

- ii) In Parishes where there is no resident Deacon, the Bishop's Deacon will read the Gospel, lead the Prayers for the Candidates (or Prayers of the People), set the Table and Dismiss the People. A lay person should be appointed to be the Bishop's chaplain in this case.
- c. **Baptism:**
 - i) The celebration of Baptism in conjunction with Confirmation (and Reception and Reaffirmation) is highly recommended.
 - ii) Where Baptism is to be celebrated by itself, or in addition to Confirmation (and Reception and Reaffirmation), the rector/vicar will administer Baptism. The Bishop will offer the "Thanksgiving Over the Water," and will anoint the candidates with Chrism.
- d. **Bishop signs certificates:**

The Bishop prefers to sign certificates and the registers prior to the service. This enables him to be free to visit and take pictures with confirmands (et al.) following the service. After pictures, if any, the Bishop will divest and be available for receptions, etc.
- e. **Name Tags:**
 - The Christian name (only) of each Confirmand should be written in clear, block letters on their nametag.
 - Nametags should be on the RIGHT side of the Confirmand, and easily visible.
 - If the pronunciation of the name is difficult, it should be drawn to the Bishop's attention early.
 - In the LOWER RIGHT corner of the nametag, a designator with a single letter should be placed as follows:
 - C = Confirmation;
 - R = Reception;
 - A = Reaffirmation.
- f. **See Appendix I for additional direction.**

3. **Ordinations: See Appendix J (page 45)**

IV. DIOCESAN POLICY AND PROCEDURES

A. Of General Policies

1. Title to Property

Article 13 of the Constitution of the Diocese of Dallas provides as follows:

"The title to all real estate acquired for the use of the Church in this Diocese, which includes all Parish, Missions and diocesan institutions, shall be held in the name of "Corporation of the Episcopal Diocese of Dallas." (known as "Diocesan Corporation"), pursuant to, and in all ways administered, dealt with, and disposed of as specified in the Canons of the Diocese.

2. Historic Designation

No Church or Church-owned structure of this Diocese may be designated an historic landmark without the written permission of the Corporation of the Episcopal Diocese of Dallas, *and* the Standing Committee of the Diocese.

3. Games of Chance

It is the policy of the Bishop that no congregation or organization within a congregation will host, sponsor, or participate in any game of chance in which individuals receive a prize of value. This policy includes, but is not limited to, games of chance such as bingo, “casino nights,” etc. Raffles or drawings for items locally produced without monetary investment by the parish or organization, where the ticket price is relatively small, and a ticket purchase is not necessary to participate, and where such an event is otherwise permitted by local ordinance may be authorized by the Bishop on recommendation by the clergy in charge (in the case of a congregation) or person in charge (in the case of organizations). Inquiries may be directed to the Canon to the Ordinary.

4. Alcoholic Beverages

- a. It is the policy of the Diocese that no congregation or church group shall engage in the sale of alcoholic beverages of any kind at any function of the congregation or any church organization. Additionally, congregations may not advertise or promote “suggested donations” for alcoholic beverages. No outside groups are permitted to sell alcoholic beverages on Church premises.
- b. The serving of alcoholic beverages (without charge) at wedding receptions, suppers, picnics and other events whether on or off church property is to be undertaken at the discretion of the rector/vicar and vestry, subject to the following guidelines:
 - i) The Church must provide a safe and welcoming environment for all people, including people in recovery. Moderation is to be observed at all times;
 - ii) All applicable laws should be obeyed;
 - iii) Appealing non-alcoholic beverages must always be offered with equal prominence and accessibility as alcoholic beverages;
 - iv) Events should not be publicized with alcoholic beverages as a focus;
 - v) Food must be served when alcohol is present;
 - vi) When alcohol is served, it must be carefully monitored so that no minors and no persons showing signs of intoxication are served. The use of TABC-certified servers is encouraged;
 - vii) Serving of alcohol at youth events is prohibited and serving of alcohol at events at which youth are present is discouraged and should be closely monitored;
 - viii) Arrangements should be made to prevent any intoxicated person from driving; and
 - ix) No alcohol may be served while Church business is being conducted.

5. Firearms

Effective January 1, 2016, Texas Open Carry Laws permit those persons now qualified to carry concealed firearms to carry their firearms in the open. The same restrictions against license holders carrying concealed firearms (for example, prohibitions against carrying firearms in court rooms, government offices, polling places, professional sporting events, bars, places with appropriate signage) will now apply to those who carry in the open.

With the diversity of churches in this Diocese, the Standing Committee and I believe that rectors and vestries, who best know the particular circumstance of their congregations, would also be best suited to decide how to maintain appropriate decorum, safety and security within their church communities. Among the options available to parishes are the following:

- a. You may do nothing. Many believe that posting any kind of sign prohibiting firearms on the premises advertises to someone with criminal intent that there is nothing to stop them.
- b. You may simply direct your ushers to ask those who enter carrying a firearm in the open (with the exception of law enforcement personnel) to please conceal their firearm or lock their weapon in their car. When there is no sign posted, a verbal request carries the same legal authority as a sign.
- c. You may post signs prohibiting the OPEN CARRY of firearms on the premises (while continuing to allow the lawful carry of concealed firearms).
- d. You may post signs prohibiting both OPEN and CONCEALED CARRY of firearms on the premises.

Please note that for signs to be legally effective they need to be posted at all entrances and meet specific statutory criteria (for example, the type size, wording, and Spanish translation).

B. Of Marriage

1. Marriage

- a. The teaching of the Diocese is that found in the BCP (pg. 423) first paragraph.
- b. No priest may solemnize the vows of marriage of any couple unless they have first obtained a license to be married provided by civil authority.
- c. No priest may solemnize the vows of marriage of any couple unless he/she has first counseled with the couple on the nature, meaning and purpose of Christian marriage.
- d. Priests of this Church should officiate at the rite of Holy Matrimony only when there is a significant pastoral relationship between the priest and at least one party to the marriage.
- e. Deacons are not authorized or licensed to officiate at the rite of Holy Matrimony.
- f. Deacons may assist in the service, including the preaching of the homily.
- g. Priests are responsible for the pastoral counsel and teaching required for couples to be married according to the rite of this Church.

- h. All persons to be married in this Church must sign a declaration of intention in the presence of the priest who will officiate at the wedding, and solemnize the vows of the man and woman, which declaration is to be held on file as a part of the records of the congregation.
(See APPENDIX B: DECLARATION OF INTENTION, pg. 34)
- i. At least one party to the marriage must be a baptized person (TEC Title I, Canon 18, Sec. 3(b)). Both parties to the marriage must signify their free and informed desire to receive the ministration of Holy Matrimony as provided by this Church, without coercion, fraud, or mental reservation.
- j. Marriages are expected to be celebrated in the church as services of worship and not as private affairs or social spectacles.
- k. In their discretion, priests may officiate at services of Holy Matrimony at sites other than the church structure.
- l. Clergy may not solemnize the vows of marriage until at least thirty days have passed between the time when the parties first signify their intention to the priest, and the date of the service. This period may be waived, provided that the cause for waiving the thirty days' requirement is weighty, and the member of the clergy concerned reports this action to the Bishop in writing. (TEC Title I, Canon 18, Sec. 2)
- m. No priest may bless sexual unions or relationships in this Diocese which do not meet the criteria for Holy Matrimony set forth in the Book of Common Prayer and the Canons of this Diocese.

2. Marriage in Distress

Christian tradition and the Canons of this Church lay upon the clergy the duty to “*labor* that the parties may be reconciled.” (TEC Title I, Canon 19, Sec. 1). This labor will involve not only pastoral counseling, but a positive attitude of engagement and support for the sake of the couple concerned. Divorce must be seen as the last resort.

Be it noted that it is the duty of the Clergy to “act first” to protect and promote the physical and emotional safety of the couple and family, specifically with respect to physical or emotional abuse.

3. Marriage Dissolution: Ecclesiastical Judgment

- a. Members of this Church whose marriage has been annulled or dissolved by civil authority may petition the Bishop for an ecclesiastical judgment as to his or her status. (Title I, Canon 19, Sec. 2). It must be made clear to the party(ies) making this petition that such a judgment in no way affects the legal validity of the marriage (in the eyes of civil authority), or the legal status of their children. (The form for such petition will be found at APPENDIX F: PETITION FOR ECCLESIASTICAL JUDGMENT, pg. 38)
- b. The ecclesiastical judgment given will take one of two forms: either that no marriage occurred in the eyes of the Church (annulment); or that the marriage was terminated.

- c. An ecclesiastical annulment is based on a thorough investigation into the conditions of the marriage with respect to:
 - i) intent - one or both parties were incapable of forming the intent to establish a Christian union;
 - ii) form - the rite used did not intend a Christian marriage and was inconsistent with the Christian understanding of marriage;
 - iii) minister - the person solemnizing the vows of marriage was not competent to do so, either by civil or ecclesiastical authority;
 - iv) subject(s) - one party misrepresented his or her true identity, or otherwise deceived the other party;
 - v) matter - the parties never consummated the union.
- d. An ecclesiastical judgment of nullity is not based on a merely legal or mechanical assessment. Rather, it is based on a serious pastoral assessment of the whole circumstance surrounding the marriage.
- e. Communicants whose marriage has been dissolved or declared null may obtain letters assuring them of their continued good standing, on request; provided that such persons are not at the same time applying for permission to be remarried.

4. Remarriage of Persons Divorced Once

- a. The remarriage of divorced persons in the Church poses a difficult dilemma. On the one hand, marriage is viewed by the Church as a Sacrament - a solemn undertaking blessed by God - and indissoluble. On the other hand, divorce is a reality that grows out of our fallen condition as human beings and all too easily reinforced as an option in our society. How we may hold up the sanctity of marriage and at the same time minister the redeeming, reconciling love of God to those who have endured the pain of divorce is the question that confronts us as a Church.
- b. Persons who have been previously married, and who have been divorced, may seek permission to be newly married in this Church. However, certain conditions must be satisfied before permission is granted by the ecclesiastical authority.
- c. A petition is made to the Bishop by a priest of this Diocese, acting on behalf of the parties desiring to marry. (A petition is required only when either one or both parties have been previously married and *when the former spouse(s) is (are) still living.*)
(See APPENDIX C: PETITION TO REMARRY (1), pg. 35, for the petition form to be completed by the priest.)
- d. The most important condition for granting permission to remarry is that there be a *significant pastoral relationship* between the priest who will officiate at the marriage and the parties to the marriage. Priests in this Diocese must exercise profound discretion in this matter on behalf of the Bishop and the whole Church. As a part of the application for permission to solemnize the marriage of a couple where one party (or both) has been previously married, the priest concerned must certify that such a significant pastoral relationship exists. This must be done advisedly and honestly.

- e. Thorough counseling and teaching on the part of the priest are expected. As a minimum, the priest must:
 - i) Determine that one party (at least) to the marriage is a member of this Church;
 - ii) Determine that the divorced party (or parties) has a certified copy of the decree of divorce;
 - iii) Determine that at least one year has elapsed between the date of the final decree and the date the petition is submitted;
 - iv) Determine that the divorced party (or parties) have been and will continue to be faithful to the terms of the decree, providing regular support where stipulated;
 - v) Determine that the divorced party (or parties) have been and will continue to be diligent in the care of children born to the previous marriage (if any);
 - vi) Determine that both parties have an understanding of the conditions which led to the divorce, and have good reason for believing that the same will not impair the new marriage;
 - vii) Have offered to the party (or parties) who is a member of this Church the Sacrament of Reconciliation;
 - viii) Have taught the nature of Christian marriage as presented in the Book of Common Prayer, and have stressed the lifelong nature of the union;
 - ix) Have witnessed the signing of the declaration of intention to that effect.
- f. When the petition is completed, certifying that the conditions outlined above have been satisfied, it should be submitted to the Bishop at least thirty days (30) in advance of the date of the marriage service. The priest will notify the Bishop immediately when the marriage has been solemnized.
- g. Petition Forms for any of the actions above are included in the appendices of this Customary and are available from the Bishop's Office. The forms are required to be completed and submitted before permission will be granted for action to be taken. Forms should be submitted in ample time (usually not less than thirty days) in order to allow for mailing, processing and interviews (should such seem necessary).
- h. Petitions for permission to bless marriages of those who have been divorced once, but who have been married by civil authority may be submitted to the Bishop by priests of this Diocese.
 - i) A letter, summarizing the circumstances of the marriage, and stating that the couple has been instructed in the Church's teaching on marriage, must be submitted by the priest who will bless the marriage.
 - ii) A one-year period of discipline is required, during which the couple is expected to show their sincerity of commitment by regular attendance at services of worship, financial support of the Church, prayer, and involvement in the life of the congregation. The rector/vicar will determine when the period of discipline has been met.

5. Remarriage of Persons Divorced More Than Once

- a. Persons who have been divorced more than once and who seek to be remarried in the Church may expect a broader, more protracted process before the possible granting of permission. This process is not intended to be punitive, but to assure that the pastoral concerns of the Church and the needs of the couple are attended to.
- b. The priest who intends to officiate at the wedding must satisfy the conditions set forth in the previous section (4. Marriage of Persons Divorced Once). In addition, the priest must:
 - i) Determine that the parties to the proposed marriage have undergone a serious course of counseling;
 - ii) Provide a narrative relating the pertinent circumstances which support an ecclesiastical wedding in this case;
 - iii) Obtain from each of the parties a narrative relating the pertinent circumstances supporting their desire to form a Christian marriage.
- c. The priest will submit all documentation to the Bishop. (See APPENDIX D: PETITION TO REMARRY (2), pg. 36, for the petition form.)
- d. The priest will notify the Bishop immediately when the marriage has been solemnized.
- e. Petitions for permission to bless marriages of those who have been divorced more than once, but who have been married by civil authority may be submitted to the Bishop by priests of this Diocese.
 - i) A letter, summarizing the circumstances of the marriage, and stating that the couple has been instructed in the Church's teaching on marriage, must be submitted by the priest who will bless the marriage.
 - ii) A period of discipline of not less than one year is required, during which the couple is expected to show their sincerity of commitment by regular attendance at services of worship, financial support of the Church, prayer, and involvement in the life of the congregation. The time of discipline shall be determined to have been met by the Bishop and Rector/Vicar in consultation.
- f) The Bishop will not normally authorize the remarriage of individuals who have more than two living spouses.

6. 2015 General Convention Resolution A054 Same-Sex Blessing and Marriages

The 2015 General Convention Resolution A054 gives the diocesan bishop authority to withhold permission for same-sex blessings and marriages in the diocese, and it also calls on the diocese 'to make provision' for access to such rites for those who wish them.

The policy of the diocese is articulated in diocesan Canon 12. Clergy of the diocese may not officiate at any portion of a marriage or blessing of the union of a same-sex couple, whether that marriage or blessing takes place in the diocese or outside of it, nor may any such rite be performed in any church building or other property owned by the diocese. The same restriction holds for clergy holding a license to officiate in the diocese.

Access to these rites for a couple is available in our neighboring Episcopal Diocese of Fort Worth at contact@episcopaldiocesefortworth.org. It is also true that a priest of the Diocese of Dallas, duly invited, can celebrate the Eucharist in another diocese.

I am confident our clergy, whatever their own views, will respond to questions concerning the issue itself or provision with pastoral sensitivity. May our thoughts and actions be ruled in all things by charity.

C. Of Congregations

1. Of the Annual Meeting

- a. The principal purpose of the Annual Meeting, as defined by the Canons is to elect Vestry/Bishop's Committee members to replace those whose terms are expiring. (Diocesan Canon 14.1.)
 - i) In parishes/missions the member of the clergy in charge generally appoints the Senior Warden and retiring Vestry members to a nominating committee. In some places, the Vestry or Bishop's committee sits as a committee of the whole for the purposes of making nominations. A variety of arrangements are possible. In any case, it is the duty of the nominating committee to present nominees who will bring additional know-how to the Vestry/Bishop's Committee, so that its membership will reflect a broad spectrum of gifts, experience and expertise ranging from the legal and fiscal to such fields as communications, teaching and social work.
 - ii) Members of the church and their spouses who are on the staff of that church are not eligible for election to the Vestry.
 - iii) Many nominating committees prepare a slate of more names than there are positions to be filled.
 - iv) A person's commitment to the parish is utmost in determining his/her qualifications. In general, nominees must be confirmed communicants in good standing, demonstrate regularity in attendance at the public services of worship, eagerness to grow in understanding the Christian faith, experience in serving the cause of Christ in their communities, and financial commitment to the work of the congregation.
 - v) Of course, each nominee should also be sounded out about his/her willingness to serve and have agreed to do so before being presented to the Annual Meeting,
- b. With careful planning, the Annual Meeting can also become a major occasion in the church year for rallying morale, analyzing the progress of the past twelve months, and concentrating on goals for the immediate future.

2. Of Vestries

- a) The Term "vestry" applies to Parishes and Missions.
- b. Each year in the congregations of this Diocese, a number of Vestry persons are elected at the Annual Meeting. These men and women are chosen by members of the congregation to act as their representatives in the congregation's relations with its clergy and the management of its corporate property. The Vestry, is thus, in an important sense, the management team of the parish.

- c. The Vestry is accountable to the congregation for the supervision and conduct of the temporal affairs of the congregation. They also share responsibility with the Rector or Vicar for setting the pace, shape and direction of parish or mission life. When the lines of communication between congregation, Vestry, and the member of the clergy in charge promote frank discussion and mutual confidence, the stage is set for action and the Church moves forward as is expected by the demands of the Gospel.
- d. The Constitution and Canons of the Diocese make clear that it is the duty and responsibility of the Vestry to see that the diocesan assessment is paid promptly to the Diocese. (Article 14; Canon 14, Sec 11)

3. Of Delegates to Convention

- a. Delegates and Alternates to the Annual Convention of the Diocese of Dallas are elected in the Annual Parish Meeting of the congregation and serve until their successors are elected.
- b. Delegates and Alternates must be confirmed communicants in good standing, at least 18 years old.
- c. The number of delegates to be elected is determined on the basis of the size of the congregation as determined by Article 2 of the Constitution of the Diocese of Dallas.
- d. If a delegate cannot serve and no elected Alternate is available, the priest or clerk of the vestry or a warden may certify another person to serve in place of the elected delegate.

4. Of Annual Parochial Reports

Each priest and Vestry/Bishop's Committee is expected to comply with the requirements of the Episcopal Church in preparing and submitting Annual Parochial Reports on schedule. The report for the preceding year is due in the Diocesan Office no later than March 1ST of the succeeding year. In addition, the clergy and Vestry/Bishop's Committee have responsibility for supplying any information requested by the diocesan office.

5. Concerning Audits

It is a requirement of the Church and of the Diocese of Dallas that there be an annual audit of the church's financial records. This audit may be done either by a professional auditing firm or by a CPA, or by a committee following the diocesan audit guide.

6. Concerning Bonding

Each church in the Diocese that is insured with Church Insurance Agency of Vermont has a \$25,000 bond amount included in their policy. Every treasurer handling money in the name of the church or any of its organizations is covered by this bond.

V. APPENDICES

APPENDIX A: CLERGY DATA SHEET & CONFLICT OF INTEREST POLICY

Date: _____

Full Name (First/Middle/Maiden *if applicable*/Last): _____

Name You Are Called By: _____

Residence Address: _____

City: _____ State: _____ Zip: _____

Home Telephone: _____ Cell Phone: _____

Email Address: _____

Your Date of Birth: _____

SPOUSE

Marital Status: _____ Date of Marriage: _____ Spouse's Date of Birth: _____

Spouse's Full Name: _____

Spouse's Phone: _____ Occupation: _____

Spouse's Email: _____

CHILDREN

Name: _____ DOB: _____

Name: _____ DOB: _____

Name: _____ DOB: _____

Name: _____ DOB: _____

CLERICAL INFORMATION

Seminary: _____

Degree(s): _____

Diaconate Ordination Date: _____ Diocese Where Ordained: _____ Ordained By: _____

Priesthood Ordination Date: _____ Diocese Where Ordained: _____ Ordained By: _____

Diocese of Canonical Residence: _____

WORK RELATED

Present Parish/Mission Where Employed: _____

Position and/or Title: _____

Office Address: _____

Office Phone: _____

Date Installed/or Began: _____

Current Diocesan Committee/Commission Assignments: _____

Clerical Skills/Interests: _____

Could You Serve as Supply? _____

CLERGY DATA SHEET / PAGE 2

Do you derive earned income from sources other than from your clergy role?

☐ Yes ☐ No

If yes, please describe for how long and from what sources.

Do you intend to seek such earned income in the next year?

☐ Yes ☐ No

If yes, please describe:

If you have secular professional licenses you maintain, please list them here.

Do you have any formal complaints filed as a result of any secular business activity?

☐ Yes ☐ No

If yes, please describe:

I certify that the above information is accurate and complete. I will notify the Bishop of any material change.

Your printed name

Signature

Date

Episcopal Diocese of Dallas Conflict of Interest Policy

The purpose of this policy is to protect the interests of the Episcopal Diocese of Dallas (Diocese), parishes and other organizations within the Diocese, and parishioners. Conflicts of interest, at any level, create an appearance of impropriety and an opportunity for undue influence and potential exploitation, all of which undermine the integrity of the Church, its clergy and our Christian mission.

As lay and clergy living and working in a Christian community, we should in all of our dealings with one another comport ourselves in compliance with a higher ethical standard than is customary in the secular world. In particular, conduct of clergy is expected to be of the highest moral, ethical and professional character, consistent with their ordination vow to pattern their lives “in accordance with the teachings of Christ.”

Conflicts of interest may take many forms, including:

- Secular business dealings between the Diocese, a parish or other organization within the Diocese, on the one hand, and a person, clergy or lay, on the other hand, who has both (a) a decision-making role in authorizing such dealings by virtue of his or her membership on the Standing Committee, Executive Council, Parish Vestry, Bishop’s Committee or other governing board (a “Decision Maker”), and (b) a material direct or indirect financial interest in such dealings (referred to in this policy as “Decision-Maker Conflicts”)
- Secular business dealings between a member of the clergy or members of his or her immediate family, on the one hand, and the Diocese, a parish, mission or other organization affiliated with the Diocese or a parishioner of an Episcopal faith community within the Diocese, on the other hand (referred to in this policy as “Clergy Secular Business Conflicts”)

Decision-Maker Conflicts

A material direct or indirect financial interest may arise by virtue of:

- ownership or control of an entity with which the Diocese, parish or other entity proposes to engage in business dealings, whether such ownership or control is held or exercised, directly or indirectly, by the Decision Maker or someone in the Decision Maker’s immediate family
- serving as an officer or director of an entity with which the Diocese, parish or other entity proposes to engage in business dealings
- by reason of the member’s potential receipt of compensation or material gifts as a result of such dealings.

Each member of a decision-making body has an absolute duty to disclose, prior to any action on a matter in which such member has a material, direct or indirect financial interest, to the decision-making body, the nature and extent of any material financial interest. Ownership of less than 5% of a publicly traded company shall not be considered material.

Upon such a disclosure, the decision-making body may proceed with such business dealings only if:

- the disclosing member abstains from all deliberations and actions with respect to such matter, and
- the decision-making body determines that the terms of the business dealings are as least as favorable to the Diocese, parish or other entity as would be available from an independent third party and there is a compelling reason why the business’s products or services are preferred over another firm.

Clergy/Secular Business Conflicts

This policy recognizes differences in professions and occupations. It is not intended to govern the engagement in secular business dealings between clergy and lay people in activities that should not pose a conflict of interest, such as being a tailor, and working at a retail establishment such as a restaurant or hardware store. However, it would govern the activities for such professions as physician, attorney, financial advisor and realtor, and the restrictions on these professional activities are described below.

The following restrictions apply equally to clergy and members of their immediate family.

Clergy should not engage in any secular business or professional activities without first obtaining the written consent of the Bishop. All such activities are to be the subject of periodic reporting to the Bishop or his designee as required by procedures established by the Bishop. Any formal complaint against a clergyperson for any secular business activity must be reported to the Bishop immediately.

Clergy are not to engage in any secular professional business dealings with:

- the Diocese
- any parish, mission, or other entity affiliated with the Diocese
- any parishioner with whom the clergy has a pastoral relationship

Secular professional business dealings between clergy and parishioners of an Episcopal faith community in the Diocese and outside of the clergyperson's cure are strongly discouraged and are permissible only with the prior consent of the Bishop, with the advice and consent of the Standing Committee.

Clergy who had a professional secular career prior to ordination and who continue such career after ordination may be granted exceptions to this policy by the Bishop, with the advice and consent of the Standing Committee. Such consent will be given on a case by case basis in very limited circumstances and only upon a showing that:

- there is no active marketing or solicitation of parishioners by the clergyperson
- the parishioner is not engaged in a pastoral relationship with the clergyperson
- the parishioner is an experienced, sophisticated and well informed consumer of the particular product or service
- such dealings are in full compliance with all applicable industry and self-regulatory organization rules and the clergyperson is in good standing within the industry and any self-regulatory organization
- For clergy who are financial advisors, such dealings do not involve the exercise of discretion and the clergyperson does not have authority to make decisions on behalf of the parishioner without their knowledge or prior authorization, and
- the clergyperson has advised the parishioner in writing that such dealings are not endorsed by the parish, the Diocese or the Bishop.

Any consent or waiver granted under this policy may be revoked or modified at any time.

Appendix B: Clergy Data Sheet in the Customary of the Diocese of Dallas (as revised hereby) must be updated annually. Upon request by the Bishop or his designees, names of clients may be requested, and they may be called to serve as a reference on how the business relationship is going. As stated at the beginning of this policy, the policy applies equally to clergy and immediate members of their families.

APPENDIX B: DECLARATION OF INTENTION

We understand the teaching of the church that God's purpose for our marriage is for our mutual joy, for the help and comfort we will give to each other in prosperity and adversity, and, when it is God's will, for the gift and heritage of children and their nurture in the knowledge and love of God. We also understand that our marriage is to be unconditional, mutual, exclusive, faithful, and lifelong; and we engage to make the utmost effort to accept these gifts and fulfill these duties, with the help of God and the support of our community.

(signed) _____

(signed) _____

(signed) _____

(witness) _____

(dated) _____

APPENDIX C: PETITION TO REMARRY (1)

This form is required for all individuals who have been previously married once and whose previous spouse is still living, and who seek to be remarried in the church. *Petitioner* is the divorced person. A separate form must be submitted for both the man and woman if both have been previously married.

Petitioners full legal name: _____

Full legal name of intended spouse: _____

Petitioner's present age: _____ Age of intended spouse: _____

Petitioners present status in the church: _____

Date petitioner made intentions known to you: _____ Date of civil marriage: _____

Was the petitioner previously married in the Church? _____ Number of this marriage: _____

Date of planned marriage ceremony: _____

- ☐ I have placed a certified copy of all divorce decrees in parish file, and only first and certified signature pages are attached.
- ☐ At least one year has elapsed between the date of the final decree of divorce and the date of this petition.
- ☐ All obligations to former spouse(s) and children have been satisfied.
- ☐ Petitioner continues to meet any obligations that still exist, and both parties of this marriage are willing to do
- ☐ Both parties freely and knowingly consent to this marriage without fraud, coercion, mistake of partners identity or mental reservation.
- ☐ Both parties have signed the Declaration of Intention in your presence.
- ☐ I have discussed the Sacrament of Reconciliation with the petitioner.
- ☐ All other canonical and civil requirements have been met.
- ☐ Both parties have been instructed in the Church's teaching on marriage.

1. On the back of this form, please explain any condition not checked above, or any other problems pertinent to considering this petition.
2. Attach to this form a narrative description of the circumstances which led to divorce, and what prospect the new marriage has of dealing with such problems.

Check A, B, or C. As a summation of your opinion would you

- A) _____ gladly officiate at this proposed blessing.
- B) _____ officiate without feeling either way.
- C) _____ not care to officiate at this proposed blessing (1.17.4)

Priest Submitting Petition: _____ Signature _____

Date: _____

Parish/Mission: _____ Town: _____

APPENDIX D: PETITION TO REMARRY (2)

This form is required for all individuals who have been previously married more than once and at least one of whose previous spouses is still living, and who seek to be remarried in the church. Petitioner is the divorced person. A separate form must be submitted for both the man and woman if both have been previously married.

Petitioner's full legal name: _____

Full legal name of intended spouse: _____

Petitioner's present age: _____ Age of intended spouse: _____

Petitioner's present status in the church: _____

Date petitioner made intentions known to you: _____ Date of civil marriage: _____

Was the petitioner previously married in the Church? _____ Number of this marriage: _____

Date of planned marriage ceremony: _____

- ☐ I have placed a certified copy of all divorce decrees in parish file, and only first and certified signature pages are attached.
- ☐ At least one year has elapsed between the date of the final decree of divorce and the date of this petition.
- ☐ All obligations to former spouse(s) and children have been satisfied.
- ☐ Petitioner continues to meet any obligations that still exist, and both parties of this marriage are willing to do so.
- ☐ Both parties freely and knowingly consent to this marriage without fraud, coercion, mistake of partners identity or mental reservation.
- ☐ Both parties have signed the Declaration of Intention in your presence.
- ☐ I have discussed the Sacrament of Reconciliation with the petitioner.
- ☐ All other canonical and civil requirements have been met.
- ☐ Both parties have been instructed in the Church's teaching on marriage.
- ☐ Both parties understand that this petition will be presented to the Standing Committee, which may elect to interview them before making their recommendation to the Bishop.

1. On the back of this form, please explain any condition not checked above, or any other problems pertinent to considering this petition.
2. Attach to this form a narrative description of the circumstances which led to each divorce, and what prospect the new marriage has of dealing with such problems.
3. Attach to this form letters from both parties supporting their understanding of and desire to form a Christian marriage, and relating the circumstances of their previous marriages.

Check A, B, or C. As a summation of your opinion would you

- A) ___ gladly officiate at this proposed blessing.
- B) ___ officiate without feeling either way.
- C) ___ not care to officiate at this proposed blessing (1.17.4)

Priest Submitting Petition: _____ Signature _____

Date: _____

Parish/Mission _____ Town: _____

APPENDIX E: PETITION TO BLESS A MARRIAGE

This form is required for all individuals who have been previously married and whose previous spouse is still living and who, having been remarried in a civil ceremony, desire to have that marriage blessed by the church. *Petitioner* is the divorced person. A separate form must be submitted for both the man and woman if both have been previously married.

Petitioner's full legal name: _____

Full legal name of spouse: _____

Petitioner's present age: _____ Age of Spouse: _____

Petitioner's present status in the church: _____

Date petitioner made intentions known to you: _____ Date of civil marriage: _____

Date of planned blessing: _____ Was the petitioner previously married in the Church? _____

Number of this marriage: _____

- ☐ I have placed a certified copy of all divorce decrees in parish file, and only first and certified signature pages are attached.
- ☐ All obligations to former spouse(s) and children have been satisfied.
- ☐ Petitioner continues to meet any obligations that still exist, and both parties of this marriage are willing to do so.
- ☐ Both parties freely and knowingly consent to this marriage without fraud, coercion, mistake of partners' identity or mental reservation.
- ☐ Both parties have signed Declaration of Intention in your presence.
- ☐ All other canonical and civil requirements have been met.
- ☐ Both parties have been instructed in the Church's teaching on marriage.
- ☐ At least ONE YEAR has elapsed between the date of the civil marriage and the date of this request.

On the back of this form, please explain any condition not checked above, or any other problems pertinent to considering this petition.

Check A, B, or C. As a summation of your opinion would you

- A) _____ gladly officiate at this proposed blessing.
- B) _____ officiate without feeling either way.
- C) _____ not care to officiate at this proposed blessing (1.17.4)

Priest Submitting Petition: _____ Signature _____

Date: _____

Parish/Mission: _____ Town: _____

APPENDIX F: PETITION FOR ECCLESIASTICAL JUDGMENT***ECCLESIASTICAL ANNULMENT OR DECREE OF TERMINATION***

This form is required for all individuals who have been divorced or had their marriage legally annulled and who wish to receive an *ecclesiastical judgment* of their marital status from the Church. It is understood that *this is not a petition for permission to remarry*. (Completion of this form is *not* necessary for those seeking to remarry only.)

Petitioner's full legal name: _____

Petitioner's address: _____

Full legal name of former spouse: _____

Petitioner's present age: _____

Petitioner's present status in the church: _____

Was the petitioner married in the Church and instructed in its teaching on marriage? _____

Did this petitioner seek your counsel during the breakdown of this marriage? _____

Does the petitioner understand what problems led to the failure of this marriage? _____

Was this marriage terminated by civil annulment or divorce? (specify) _____

Date of all marriages of this petitioner: _____

Dates of divorce decrees of these marriages: _____

Are all obligations to former spouse and children being satisfied? _____

☐

TERMINATION in this marriage.

I request a JUDGMENT OF

☐

NULLITY in this marriage.

I request a JUDGMENT OF

Priest submitting petition: _____ Signature _____

Date: _____

Parish/Mission: _____ Town: _____

NOTE: This petition must be accompanied by a letter from the individual explaining his/her understanding of the cause of the failure of this marriage. A cover letter from you is also required explaining the causes of the failure of the marriage as determined through your counseling. In the case of Petition for Nullity, specify what conditions in the marriage did not comply with TEC Title I, Canon 19, Sec. 2 (a) and those set out in the Customary, at IV.B.3.c., page 25.

APPENDIX G: ANNUAL REPORT TO THE BISHOP
 (For Non-parochial and Licensed Clergy)
Diocese of Dallas

The Customary of the Diocese of Dallas requires all **non-parochial** clergy to report annually to the Bishop on the exercise of their office. A report is also required of **non-canonically resident** clergy who request to be licensed to officiate in The Episcopal Diocese of Dallas. Please complete and submit the following report.

Has your address, phone or e-mail address changed since your last report? Yes () No ()

FULL NAME _____

PLACE OF EMPLOYMENT _____

POSITION _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

EMAIL _____

CELL _____ HOME _____

OFFICE _____ OTHER _____

CLERGY ORDER ☐ DEACON ☐ PRIEST

ARE YOU RECEIVING EMAILS FROM THE CLERGY LIST SERVE? _____; THE DIOCESAN EMAIL NEWS BLASTS? _____

Please list all changes in your personal or professional life since your last report: _____

Safe Church Training

Certificates of completion of Safe Church / sexual misconduct prevention training must be on file in the Diocesan Office for you to be considered for any work or for you to be licensed to officiate in this Diocese. It is a Diocesan requirement that this training be renewed every THREE (3) years. **Please have your church administrator send us the most recent certification.** Certificate Date: _____.

Summary of Ministry for Year: 20__

_____ Celebration of Holy Communion	_____ Baptisms	_____ Presented for Confirmation
_____ Marriages	_____ Burials	_____ Other Services:

Other (explain): _____

ANNUAL REPORT TO THE BISHOP**Diocese of Dallas****Page 2****Supply Work**

Would you be able to serve as a supply priest? Yes () No ()

If willing, do you give permission for the diocese to list your e-mail address and phone number so that you might be called to supply by churches directly? Yes () No ()

Work in Congregations

With which congregation to do you regularly Worship? _____

If you assist in any congregation, please describe your work _____

Name of any additional congregation(s) _____

Are you licensed in another diocese? Yes () No () If so, please include a copy of your license documentation from:

Diocese: _____ Bishop: _____

For Clergy Who Are NOT Resident in The Diocese of Dallas (LICENSED)

I am canonically resident in the Diocese of _____ and I will send a copy of this report to my Diocesan Bishop. Yes () No ()

I wish to be licensed to officiate in the Diocese of Dallas for the upcoming year, **20**____. Yes () No ()_____
*Signature*_____
*Printed Name*_____
Date

Forms should be sent to the
 Bishop of Dallas
 c/o The Canon to the Ordinary
 Episcopal Diocese of Dallas
 1630 N. Garrett Avenue, Dallas, Texas 75206
 Phone: 214-826-8310 / fax: 214-826-5968

APPENDIX H: SEXUAL MISCONDUCT POLICY

STATEMENT OF POLICY

It is the policy of the Diocese of Dallas that sexual misconduct of any kind by any ordained or lay person engaged in Church work will not be tolerated.

Guiding Principles:

1. As a priority, it is essential to take allegations of sexual misconduct seriously.
2. The protection of children is a matter of fundamental concern.
3. An accused person will be presumed innocent until proven otherwise.
4. The protection of the complainant and his/her family will be a paramount concern.
5. Notwithstanding the above four principles, nothing will be done that might impede a criminal investigation.

Theological Basis of the Policy:

Christians have a high calling. Christ invites and empowers us to live out our lives in the love he shows us. Our identity as Christians is both a gift and imposes certain responsibilities. We are called to the self-giving of the cross, to faithfulness, compassion, and justice. Our faith is framed by our acknowledgement of our self-centeredness, sinfulness, and brokenness, and by our commitment to the renewal of human life through dying to self and surrender to the Holy Spirit. That renewal encompasses the healing, reconciling and equipping task of ministry.

God values sexuality as good, blessed, and purposeful. Scripture sees it as a gift to be received in joy and to be held in the web of love and covenant. It finds its expression in faithfulness and self-sacrificial care, mirroring God's ways with us.

The ethic that must go with such an understanding of sexuality entails a profound, mutual and protective respect for children, women, and men, as persons made in God's image, and for everyone's right to sexual and bodily integrity.

Those who undertake as priests or laity to serve the church (whether salaried or volunteer) must, in living out their faith, adhere to Christian ethical principles in their sexual conduct and also in their exercise of authority and power. In sharing in the gospel mission to bring reconciliation, healing, and wholeness, they will draw close to those they minister to. They need to recognize the demands of trust in these relationships and the consequent potential for harm and abuse. The authority conferred by the church on those who work in Christ's name must be rooted in the love of Christ (Eph. 3:17) and love for Christ's people. In their ministry, they must model God's faithfulness.

For any Christian, to betray trust by the grave ethical transgression of sexual misconduct, whether involving a child or adult, is to deny Christian identity. Such a betrayal cannot be other than a gross injury to the one abused and a violation of faithfulness to Christ himself.

SEXUAL MISCONDUCT DEFINED

Clergy sexual misconduct may constitute either sexual abuse, sexual harassment or sexual exploitation.

Sexual Abuse

For the purposes of this policy, sexual abuse is sexual involvement or contact by a cleric with a person who is a minor or who is legally incompetent. Sexual abuse is a criminal offense in all jurisdictions in this diocese and must be reported to law enforcement officials. It is a Diocesan policy to make such reports immediately and to cooperate fully with law enforcement officials in investigating any allegations of sexual abuse.

Sexual Harassment

As used in this policy, sexual harassment includes, but is not limited to, sexually-oriented humor or language, unwelcome or undesired physical contact, inappropriate comments about clothing or physical appearance, or repeated requests for social engagements, in a situation where there is an employment, pastoral or collegial relationship between the persons involved. This explicitly includes harassment of aspirants, postulants and seminarians sponsored by, or working in, this diocese.

Sexual Exploitation

For the purposes of this policy, sexual exploitation is a betrayal of trust in a pastoral relationship by the development, or the attempted development, of a sexual or romantic relationship between a cleric and a person with whom the cleric has a pastoral relationship. Sexual exploitation includes activity such as intercourse, kissing, touching of breasts or genitals, dating during the course of counseling relationship, verbal suggestions by a cleric of sexual involvement or sexually demeaning comments by a cleric. The apparent consent of a possible victim to the sexual or romantic relationship seldom determines whether there has been sexual exploitation because the imbalance of power between the cleric and person in a pastoral relationship may undermine the validity of such consent.

Clergy Dating

In the past, romantic relationships between single clerics and other single persons with whom the cleric has a pastoral relationship have not always been defined as sexual exploitation. There are a number of priests, for example, who are married to persons who were parishioners in a parish in which they have served. Nevertheless, such relationships are always complex and subject to later interpretation. While they may appear consensual, these relationships may not truly be mutual because of the imbalance of power between the cleric and the parishioner. Similar relationships are recognized as inappropriate by members of other professions, such as doctors and therapists. Consequently, as a general rule, dating someone with whom one has a pastoral relationship is forbidden.

A cleric cannot be both priest and suitor at the same time. Thus, in a parish with a member of the clergy who is single, a parishioner dating a cleric loses his or her priest. If the relationship between the parishioner and the cleric ends, the parishioner may feel ill-treated. Regardless of the outcome of the relationship, the parish may be harmed by secrecy surrounding the relationship or by the sense of ownership and responsibility accompanying even a relationship that results in marriage.

Any member of the clergy contemplating a relationship with a person with whom the cleric has a pastoral relationship is advised to seek discernment in the Christian community. This includes consultation with the Bishop or a person appointed by the Bishop and with representatives of the parish or other place of ministry. In addition, care must be taken in such a situation that pastoral care for the parishioner is available from another priest. If a complaint is made regarding such a relationship, this diocese will investigate it according to these procedures.

Other Sexual Misconduct

For charges of alleged inappropriate sexual behavior outside the pastoral relationship, the Bishop may wish to use the Response Team as a source of advice and possible intervention.

Lay Employees and Volunteers

Although the definitions above refer exclusively to misconduct by clergy, the Church is also concerned about the behavior of its lay employees and volunteers. The procedures provided by the Diocese for investigating and dealing with sexual misconduct by the clergy, therefore, will apply to all lay employees of Episcopal parishes and other bodies within the Diocese, as well as to persons who may volunteer their services, as appropriate. The procedures will also apply, subject to canonical limitations, to all aspirants, postulants or seminarians sponsored by, or working in, this Diocese.

APPENDIX I: SERVICE DIRECTIONS

Before the Entrance:

The Rector (Vicar) should lead the preparation rite as local custom dictates.

At the Reading of the Lessons:

Lay readers should read the first and second lessons. (It is appropriate, though certainly not necessary, that they vest and be in procession. local custom dictates this decision.)

Before the reading of the Gospel, the Deacon will ask the traditional blessing by the Bishop.

At the Presentation of Candidates for Baptism:

Adults and Older Children are presented first (by their Sponsors).

Infants and Younger Children are presented next (by their Parents and Godparents).

At the conclusion of the presentation of Candidates for Baptism (BCP, p. 303), candidates for Confirmation, Reception and Reaffirmation are presented. It is appropriate that these persons also be presented by their Sponsors (Parents and Godparents, where possible). If it is convenient to do so, Sponsors should sit with their Candidate(s).

At the Baptism:

There should be a procession to the Font.

The Bishop will lead the prayer "Thanksgiving over the Water" (BCP, p. 306).

A Deacon assists in pouring the water into the Font (at the words, "we thank you, Father, for the water of Baptism.").

A Deacon presents oil for Chrismation to the Bishop for blessing (only when Chrism has not been previously blessed).

When these prayers are completed, the Rector (or Vicar) of the Parish will administer Baptism.

At Confirmation (and Reception and Reaffirmation):

It is appropriate for Sponsors to accompany the Confirmands (and others) to the Bishop's chair.

The Bishop will lay hands on the candidates. At this time, Sponsors and the Rector (Vicar) may lay hands on the shoulders of the candidates.

When Prayer Books or Bibles are to be given to candidates, the Deacon will hand them out immediately after the prayer over the candidate.

At the Peace:

The newly Baptized, Confirmands, those Received and those who have Reaffirmed their faith will be greeted by the Bishop first. They should be instructed to remain close and available for this part of the service.

Persons to be commissioned for special service in the Church may be presented to the Bishop at this time.

Where birthdays and anniversaries are recognized, it is appropriate that the Bishop and the Rector (Vicar) together bless the people who come forward.

Other observances or blessings may be made at this time, or reserved until the conclusion of the service.

At the Eucharist:

Rectors and Vicars are asked to arrange seating so that the newly Baptized, Confirmands, those Received and those who have Reaffirmed their faith are given the opportunity to make their communions as soon as the

ministers of the Altar have been served. It is appropriate that the Sponsors of these persons make their communions with the one they have sponsored.

The rubrics assert that “it is appropriate that there be only one chalice on the Altar” during the Great Thanksgiving (BCP, p. 407). Additional chalices may be filled with wine after the Breaking of the Bread.

It is appropriate for the Rector (Vicar) of the parish to concelebrate with the Bishop. In this case, the Deacon will stand at the Bishop’s left hand, pointing the Altar Book, and the Rector (Vicar) at the Bishop’s right.

In concelebrating, the Priest should raise a hand toward the Bread and Wine and recite audibly with the Bishop the words of institution.

At the Conclusion of the Service:

The Rector (Vicar) leads the concluding prayer(s) according to local custom. The Confirmands (et. al.) should be gathered for a group picture, if desired. Individual pictures may be taken with the Bishop. Please inform the people involved that this opportunity will be available.

Before the Bishop leaves, the appropriate registers of the Church should be made available for inspection. It will be helpful if a local parish directory is also given to the Bishop.

A glass of water for the Bishop would be very much appreciated at the conclusion of the service.

APPENDIX J: GUIDELINES FOR ORDINATIONS

A. Introduction

And Christ's gifts were that some should be apostles, some prophets, some evangelists, some pastors and teachers, to equip the saints for the work of ministry for building up the body of Christ. (Eph 4.11-12)

Your ordination will be a special event in your life, and it represents a special day in the life of the whole Church. Such a moment deserves careful planning and attention.

The following document is intended to help you think through and make plans that will honor the Lord you are being ordained to serve.

The first section, *Concerning the Service*, gives general advice and directions. The second section, *During the Service*, will walk you through the rite of ordination. Section three, *Service Booklets*, discusses things you need to know if you choose to have a booklet printed for persons coming to the ordination. Section four discusses *Invitations*. Section five outlines the *Procession*. Section six, *Set-up*, describes the physical arrangements that must be made in the Church building.

A Participant List – Worksheet is provided at the end of this document. You may want to make photocopies for your own use. Make notes as you think through the people who will participate in the service and what you need to tell them.

If you have questions, do not hesitate to call the Bishop's Office.

God bless you in your preparation for your ordination.

Almighty God, giver of all good gifts, in your divine providence you have appointed various orders in your Church: Give your grace to all who are called to any office and ministry for your people, especially for me, your humble servant; and so fill us with the truth of your doctrine and clothe us with holiness of life, that we may faithfully serve before you, to the glory of your great Name and for the benefit of your holy Church; through Jesus Christ our Lord, who lives and reigns with you and the Holy Spirit, one God, for ever and ever. Amen.

B. Concerning the Service

1. General:

The Rite of Ordination is a celebration of the Holy Spirit by the whole Church, in all its orders, at a particular time and place. It is an evangelical opportunity for proclaiming the mission and ministry of Jesus Christ as that is expressed in the Church's Orders.

2. The Color of the Day

The color of the day is Red, unless the Ordination occurs on a Major Feast for which the color of the day is White. Invitations should include this notification in the following or similar words: "Clergy: red (*or* 'white') stoles." Invitations should also indicate that, in general, attending clergy should wear cassock and surplice. (See example of Invitation below.) Ministering clergy (deacons and priests serving at the Altar) should be instructed to vest according to the practice of the host church, although cassock and surplice is normative.

3. Service Booklets:

Service booklets must accurately reproduce the content and rubrics of the rite prescribed in the *Book of Common Prayer* 1979, and a copy for editing to be submitted to the Bishop's Office prior to publication. (Careful editorial attention to the state of the text is required: be sure, especially, that the name of the Ordinand is used in the proper places and is accurate, and that the pronouns are correct for their antecedents.)

Note: Service booklets, if used, must include in its entirety the "Preface to the Ordination Rites" found on page 510 in the Book of Common Prayer.

4. Ordination Liturgy:

The liturgy for the ordination is strictly according to the Book of Common Prayer, 1979. Permission will not be granted for additions to the liturgy from any sources nor for changes to or deletions from the liturgy as given in the Book of Common Prayer, 1979.

5. The Name of the Ordinand:

The Name of the Ordinand will be given in full in all parts of the Presentation where the siglum "*N.N.*" is found. In the remaining parts of the service, at the siglum "*N.*", the given Christian name is sufficient.

6. The Bishop's Chair:

A single chair of suitable dignity for the use of the Bishop is to be placed before the Altar and facing the People. If more than one Bishop is involved in the celebration, the other Bishop(s) will be seated in the choir or other place conveniently close to the ordaining Bishop.

7. Concerning the Signing of the Declaration:

A table or lectern is to be set in a convenient place to one side before the Bishop and in the sight of the People for the signing of the Declaration. A pen (in good working order) with indelible ink should be placed on the table or lectern (test the pen in advance). The written Form of the Declaration will be provided by the Bishop's Office. The Declaration should be given to the Canon to the Ordinary at the conclusion of the celebration.

8. Vesting:

The Ordinand is vested for the beginning of the service only in an Alb, without stoles, academic hoods, or medals or crosses, etc.

9. Vestments and Vessels:

Vestments to be given to the Ordinand after the Consecration are presented to the Bishop *before* the service begins, at which time they will be blessed by him. It is appropriate that this blessing be done in the place where the other clergy are assembled prior to the service. (The vestments to be presented to the Ordinand may be in white, even though the color for the ordination rite is red.) The vestments presented are the ones which the new Deacon/Priest will wear at the Eucharist. If Vessels (e. g., a Communion set for Deacons, or chalice and paten for Priests) are to be given to the new Deacon/Priest, they are also blessed at this time by the Bishop.

10. Deacons in the Service:

At least one deacon must be assigned to those parts of the Liturgy appropriately performed by this Order: namely, reading the Gospel, setting the Table, and dismissing the People. A deacon should lead the Litany for Ordination. Another person may be assigned the task of leading the Litany, the Bishop having first been consulted and granting

permission. In the event that no Deacon appears to be available for any part of the service, consult with the Bishop, and a Deacon will be assigned.

11. The Propers:

On Major Feast days (those listed in the Prayer Book under the heading “Holy Days” and “Other Major Feasts,” pp. 16-17), the propers shall be those appointed for that Day. Otherwise, the propers for the day are those cited in the *Book of Common Prayer*, pp. 528-529, from which the Priest Ordinand is free to choose. In the ordination of Deacons, the Bishop will choose the propers.

a. The Preacher:

For the Ordination of Deacons, the Bishop is the preacher.

In the Ordination of Priests, the Bishop customarily grants permission for the Ordinand to invite the preacher of his or her choosing. The Ordinand must consult with the Canon to the Ordinary about this prior to extending any invitation. All costs associated with the preacher are borne by the Ordinand or sponsoring congregation. (See the Guidelines for Sermons at Ordinations.)

C. During the Service

1. At the Presentation

The presenters shall include at least one Priest and one Lay Person, with a total of no more than six. They will stand to both sides of the Ordinand, with the Ordinand in their midst, all facing the Bishop. It is highly recommended that the presenters rehearse their part in the service, and that they make their presentation of the Ordinand with confidence and in a clear, articulate and firm voice.

Since Presenters will be making statements on behalf of the clergy and people of the Diocese and regarding the canonical requirements for ordination, at least one presenting clergyperson must be canonically resident in the Diocese and one presenting layperson must be a member of a church of the Diocese who is well versed in the ordinand’s process, for example, a member of the Ordinand’s PCOV or of the Commission on Ministry.

2. At the Declaration:

The Ordinand(s) will recite the Declaration publicly (each separately if there be more than one), and then will proceed to the Table set aside for the signing of the Declaration. Two witnesses, one a priest canonically resident in the Diocese and one a lay person who is a member of a church of the Diocese who is well versed in the ordinand’s process, for example, a member of the Ordinand’s PCOV or of the Commission on Ministry, should be prepared to sign this document immediately thereafter.

3. At the Veni Creator:

The Bishop will lead this traditional hymn at the Consecration or designate the person to do so. A period of silence for prayer follows this hymn.

4. At the Consecration:

At the Ordination of Deacons, the candidate(s) will gather before the Bishop. The Bishop will read the prayer, then lay hands on each candidate one by one kneeling before the Bishop.

At the Ordination of Priests, the Presbyters present and vested will gather for the Consecration *before* the *Veni Creator Spiritus*. They stand around the Ordinand for the first part of this prayer, then quietly lay hands on the Ordinand for the Invocation of the Holy Spirit. The Bishop alone says, “Therefore, Father, etc.,” at the conclusion of which the Presbyters withdraw their hands. At the conclusion of the Consecration, the Presbyters return to their seats.

5. The Vesting

At the ordination of Deacons, one or more Deacons will vest the new Deacon(s), giving first the stole, then the Dalmatic (if there be one).

At the ordination of Priests, one or more Presbyters vest the new Priest, giving first the stole to the Ordinand, then the chasuble (if there be one).

It is entirely appropriate for the spouse of the Ordinand to assist with the vesting.

Once vested, the Bishop continues with the presentation of the Holy Bible.

The Bishop will greet the newly ordained and present him or her (or them) to the Congregation. The Bishop will also call upon the spouse(s) to stand with the newly ordained.

6. At the Peace:

At the Ordination of Priests, the Bishop will bid the new Priest to say, “The Peace of the Lord, etc.”

7. At the Offertory:

The new Deacon/Priest’s family members or friends may present the gifts (the bread and wine).

8. At the Great Thanksgiving:

At the ordination of Deacons, the new Deacon(s) will stand with the Bishop at the Altar.

At the ordination of Priests, the new Priest(s) should stand with the Bishop at the Altar. At the Words of Institution (“On the night he was handed over, etc.”), the new Priest(s) should extend the outside hand toward the bread/wine and say the words with the Bishop.

9. At the Invitation:

The Bishop alone will elevate the cup and the bread, and recite the Invitation.

10. At Communion:

The Bishop will communicate first, and then communicate the new Deacon/ Priest. The new Deacon/Priest will then assist the Bishop in communicating the other clergy and the people. When the clergy have been communicated, the family of the new Deacon/Priest will be brought to the Altar rail, and the new Deacon/Priest will communicate them. After this, the People will be communicated in the custom followed by the congregation.

11. At the Conclusion

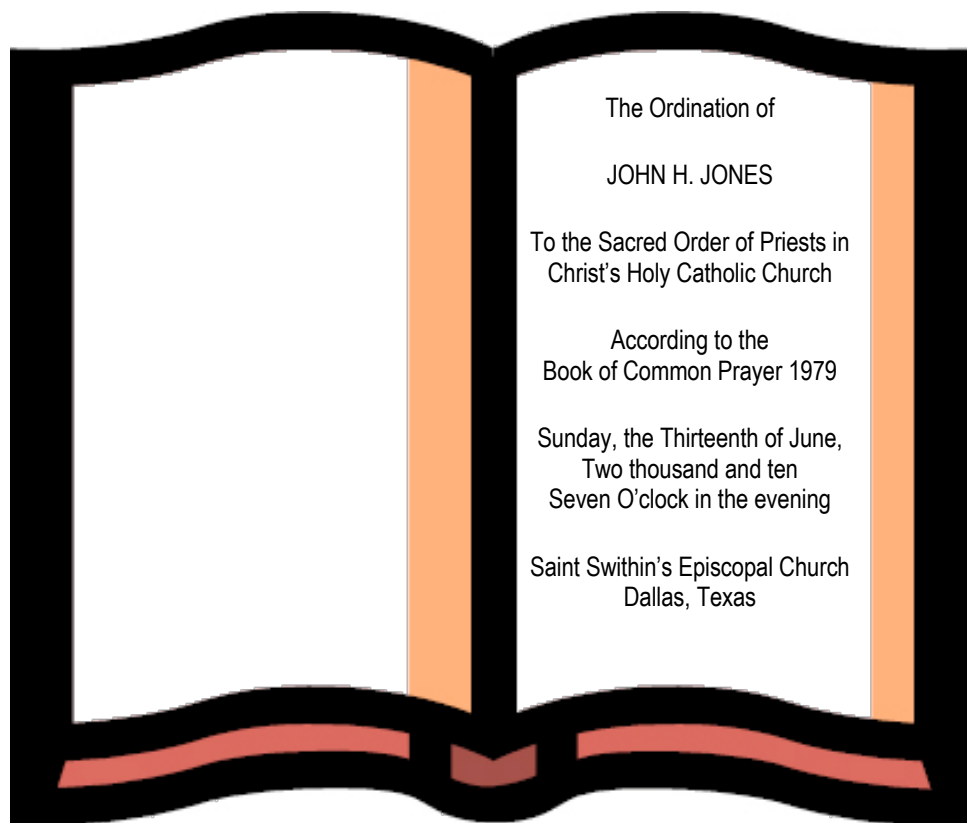
At the ordination of Deacons, after the Post-Communion Prayer the Bishop will bless the People, and the Deacon (or Deacons together if there are more than one) will dismiss the People.

At the ordination of a Priest, after the Post-Communion Prayer the Bishop will bid the new Priest to bless the People.

12. Post Ordination Blessing

The new Priest may bless the clergy and people individually at the conclusion of the service. The Bishop and his Chaplain will request a blessing immediately after the procession, and the new priest should then return expeditiously to the altar rail to bless others.

D. Service Booklets



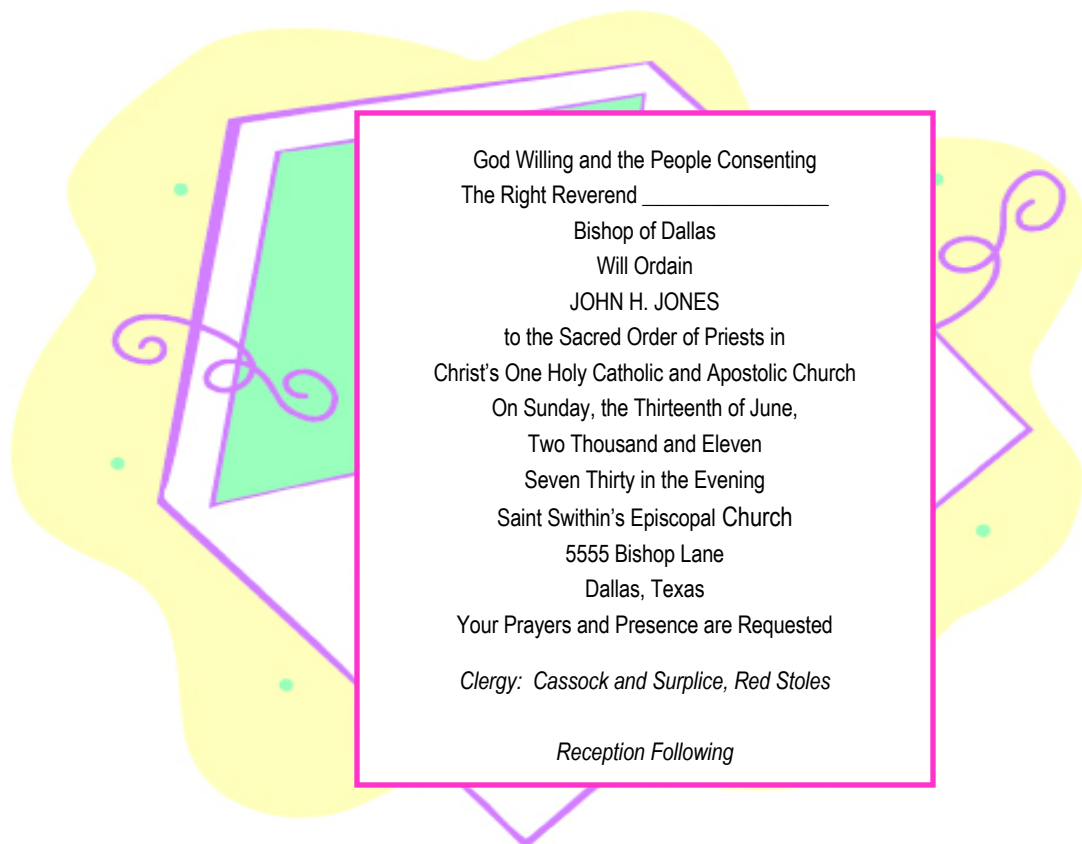
This is a sample Title Page or cover for a service booklet published for the Ordination.

NOTE: You must include the words, “According to the *Book of Common Prayer* 1979” on this page.

NOTE: You must also include in its entirety the “Preface to the Ordination Rites” found in the *Book of Common Prayer*, page 510.

If you prepare such a booklet, you must give careful editorial attention to the text. The text must reproduce faithfully the content of the *Book of Common Prayer*, including the rubrics. Be sure your name is accurately printed in the text, and that the pronouns used are accurate. In this day when formats suitable for use in computers are freely exchanged, you do not want the embarrassment of having someone else’s name in your booklet, or the male pronoun *him* referring to you if you are female!

REMEMBER: before you publish your booklet, send a copy to the Bishop’s Office. We will help examine the text for problems.

E. Invitations

Your invitations should be clear and dignified and include all the pertinent information as stated above. The size, shape, and adornments are a matter of your individual taste.


The Bishop ordaining is the one whose name should be included on the Invitation. In the case of our bishops, the wording should be:

The Right Reverend Dr. George R. Sumner
Bishop of Dallas


Be sure to include the words: "Clergy: cassock and surplice, red stole" (or "white stole," when appropriate).


REMEMBER: before you print your invitations, send a copy to Bishop's Office, for final approval.


F. The Procession

The Procession is formed according to the following order. At the symbol  banner bearers or additional crucifers (together with torch bearers) may appropriately be inserted into the procession, if desired.

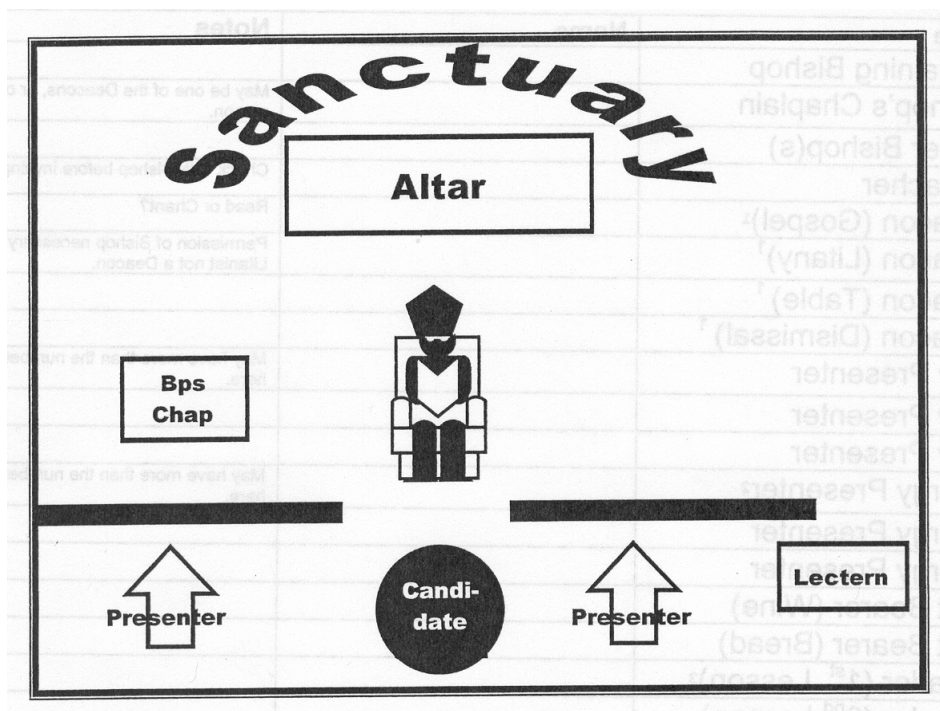
The Thurifer
The Boatman
Two Torchbearers and Crucifer
The Choir (if processing)


The visiting Clergy
The Servers (acolytes)
The Litanist (if not a deacon)


The Lay Presenters
The Clerical Presenters
The Candidate


The Deacons of the Mass
The Ministering Clergy
The Deacon with the Gospel Book
The Preacher
(Other Bishops)
The Bishop's Chaplain
The Ordaining Bishop

G. Set-Up



The Church set-up will depend in detail on how much room is available for the liturgy. In general, however, the Bishop's Chair is set up at the entrance to the sanctuary and in front of the altar. Room should be left for the bishop to kneel at the chair for the Litany.

At the Presentation, the candidate should stand directly in front of the bishop, facing him. The candidate is flanked by the presenters, half on each side of the candidate. At the rehearsal, the presenters should rehearse their cues for making the presentation to the bishop. The candidate and presenters should move purposefully and promptly to their positions immediately after the Bishop says the Collect for Purity. All presenters should speak together, confidently, articulately and firmly saying, "James, Bishop in the Church of God _ etc."

After the candidate has made the public declaration required in the *Book of Common Prayer*, he or she will go to the table or lectern set aside for this purpose and sign the document. Be sure that a pen has been placed there and be sure that it works! Two of the presenters will be asked to witness the declaration signing with their own signatures. These two should be notified of this before the service begins and be prepared to step up and sign the document.

When the declaration and affirmation are complete, the Bishop will call the People to prayer. The Litanist should come forward promptly and begin to lead the Litany. A *prie dieu* may be placed before the bishop (if so, at roughly the place where the candidate will be standing) for use by the Litanist.

The table/lectern and the *prie dieu* may be removed after the Sermon, and in any case before the Great Thanksgiving.

H. Participant List – Worksheet B

Role	Name	Notes
Ordaining Bishop		
Bishop's Chaplain		May be one of the Deacons or other person
Other Bishop		
Preacher		Check with the Bishop before inviting
Deacon (Gospel) ¹		Read or Chant
Deacon (Litany) ¹		Permission of the Bishop if Litanist is not a Deacon
Deacon (Tablet) ¹		
Deacon (Dismissal)		
Lay Presenter		May have more than the number listed here
Lay Presenter		
Lay Presenter		
Clergy Presenter		
Clergy Presenter		
Clergy Presenter		
Gift Bearer (Wine)		
Gift Bearer (Bread)		
Reader (1st Lesson) ³		
Reader (2nd Lesson)		
Master of Ceremonies		
Organist/Choir Master		Be sure to discuss requirements in this document which apply to musicians
Crucifer		
Thurifer		Optional
Boatman		Optional
Ministering Clergy ⁴		
Ministering Clergy		
Ministering Clergy		
Ministering Clergy		

¹A single deacon can carry out multiple roles.²Deacon Ordinands should be presented by at least one Deacon; Priest Ordinands should be presented by at least one Presbyter.³One person may read both the lessons.⁴These will assist in the administration of the Sacrament. May have as many as are required.

APPENDIX K: SAFE CHURCH CONFLICT OF INTEREST FOR THE PROTECTION OF CHILDREN AND YOUTH FROM ABUSE

You can access this information by clicking on the links below or go to
<http://edod.org/resources/safeguarding/>

APPENDIX L: MINISTRY FUNDS POLICY

CLERGY MINISTRY FUNDS POLICY

The Customary of the Diocese of Dallas authorizes the Vestry of each congregation, at their discretion, to establish a Ministry Fund or Funds [formerly referred to as Discretionary Fund (s) or Clergy Fund (s)] to be administered by members of the clergy of the congregation¹ to further the mission of that congregation and are to be used for “missionary and charitable purposes of the congregation.”² It shall be the responsibility of the Vestry³ to establish specific procedures for the administration of and the accounting for Ministry Funds even as the funds may be dispensed by the clergy, as provided by the Customary and Canons, while observing these administrative procedures.

1. Identification of Ministry Funds. All Ministry Funds of a congregation must be recorded in the general accounts of the congregation and shall be clearly identified on an individual fund basis in the expanded consolidated balance sheet of the congregation. Every Ministry Fund shall have a “Ministry Fund Purpose Statement and Guidelines” that is prepared by the Rector⁴ and approved by the Senior Warden and the Treasurer. If a restricted purpose Ministry Fund is created as a result of a gift to the congregation whereby the donor requires confidentiality, the fund may be shown on the books under the generic title of “Restricted Ministry Fund I” provided that its purpose is disclosed to the Senior Warden and the Treasurer. No “off books” Ministry Funds will be permitted.

2. Ministry Funds versus “Business Expense Account” Funding, approval, reimbursement and accounting for clergy business related expenses is a process separate and apart from transactions related to Ministry Funds. Expenditures for business purposes or the acquisition of business equipment or supplies should not be made with monies taken from a Ministry Fund Account. Please see paragraph 1 above.

3. General Guidelines and Procedures for Deposits to Funds.

The Rector, with the approval of the Vestry, will determine methods for funding the Ministry Fund (s). Permitted sources of funding should be included in the procedures for administration established by the Vestry. These can include moneys from the Operating Budget in accordance with the congregation’s budgeting process; special donations by parishioners; funds raised in compliance with the congregation’s fund raising policy; designated Sunday plate offerings; or other such means approved by the Vestry. Grants provided by the Diocese may not be used for Ministry Funds.

¹ As used in this document, the term “Congregation” shall refer to a mission or a parish of the Diocese of Dallas. “Church” may be used interchangeably when referring to a congregation.

² Customary of the Diocese of Dallas, April, 2009, Page 4, (9.)

³ The term “Vestry,” as used in this document, is defined in Canons 14 and 15 of The Canons of the Diocese of Dallas.

⁴ The term “Rector,” as used in this document, is defined in Canons 14 and 15 of The Canons of the Diocese of Dallas. It is intended that Rector, Vicar and Priest-in-Charge be used interchangeably for the purpose of this Policy.

Book Entries. All deposits and book entries will be made in a way that gives effect to the intent of the donor. Funds for a use other than the use set forth in the relevant Ministry Fund's Purpose Statement and Guidelines shall not be deposited or entered into the books for that Ministry Fund. Funds donated for general or undesignated Ministry Fund use will be deposited to one or more Ministry Funds as determined at the discretion of the Rector.

Reporting and Tax Deductibility. Donors who wish to contribute to a Ministry Fund and receive credit separate from their pledge on their acknowledgment from the congregation should make their checks payable to congregation, indicating on the "memo" line the name of the Ministry Fund to which they are contributing. Making the check payable in this manner allows the donor to list the donation as a charitable contribution on the donor's federal income tax return.

Donations for the Direct Benefit of an Individual are Prohibited. Donations that directly benefit an identified or identifiable individual, such as a donation to pay for "medical expenses for John Smith" (or "any relative of John Smith") cannot be placed in Ministry Fund accounts, as such donations are not tax deductible (whether made to congregation or to a Ministry Fund). The Chancellor and Treasurer of the congregation or of the Diocese should be consulted when any such donations are received.

4. Supervision and Administration.

Administrators. Ministry Funds, while subject to control by members of the Clergy, remain the property and funds of the congregation and must therefore be supervised and administered pursuant to that Church's governance documents and policies; the terms of the particular Ministry Fund's Statement of Purpose and Guidelines and applicable law. The Rector will administer or will appoint a member of the Church's staff to administer (the "Administrator") each Ministry Fund. (In the event there are multiple Ministry Funds, more than one Administrator is strongly recommended.) In order to help ensure that confidentiality of "persons in need" is maintained, when possible the Administrator of a Ministry Fund that benefits "persons in need" should be a member of the Clergy. The Rector may remove any Administrator at any time and appoint a replacement Administrator. In the event a Ministry Fund does not have an Administrator, the Rector will serve as Administrator. Any appointment of an Administrator or change of Administrator will be promptly reported to the Senior Warden, the Treasurer and the Vestry.

Upon termination of the Rector's employment with the congregation, the Rector shall present an accounting of any Ministry Funds administered by the Rector to the Senior Warden and Treasurer. The departing Rector may leave written instructions for disbursement of funds in the Ministry Funds administered by the Rector, along with appropriate supporting documentation, in instances in which disbursement of the funds would be inappropriate or premature prior to the date on which the Rector's employment terminates, subject to approval by the Treasurer and Senior Warden. During any time when a congregation has no Rector, for each Ministry Fund formerly administered by the Rector, the Vestry shall appoint either an appropriate person from the parish staff or the Treasurer to act as the Administrator of such Ministry Fund, *provided, however*, that the Rector's Fund will be administered by either the Senior Warden or the Treasurer of the congregation as determined by the Vestry. The Rector may be removed without his consent as Administrator of any Ministry Fund only by the Bishop of the Diocese.

Duration. Each Ministry Fund will be an ongoing fund of the congregation with perpetual duration, *provided, however*, that a Ministry Fund may be terminated upon recommendation of the Rector to the Vestry and subsequent approval of the termination by Vestry. Upon the termination of a Ministry Fund, an accounting shall be made of the Ministry Fund and any monies remaining in the Ministry Fund shall be promptly (i) redistributed to another Ministry Fund of the congregation by the Treasurer, in consultation with the Vestry, in accordance with any restrictions that may apply to the monies remaining in the Ministry Fund, including but not limited to donor intent, or (ii) distributed by the Rector in accordance with the purpose, restrictions and procedures associated with Ministry Fund being terminated. The Statement of Purpose and Guidelines of each Ministry Fund will state whether funds remaining in an account will remain in the account after the end of the fiscal year, rolling over into the next fiscal year.

5. Use of Ministry Funds. Donations to Ministry Funds are tax deductible gifts to the congregation in the same way pledge payments and other donations are tax deductible gifts to the Church, if used for appropriate charitable or religious purposes. However, Ministry Funds are to be used at the direction of the Rector or Administrator for the purposes stated in the Statement of Purpose and Guidelines of the Ministry Fund, rather than at the direction of the Vestry.

*Authority of the Vestry.*⁵ Item 5 notwithstanding, the Rector or an Administrator may not use the proceeds from a Ministry Fund to cover the cost of an expenditure of any nature that the Vestry has previously declined to authorize or fund from the parish operating budget or otherwise.

No Personal Benefit. Under no circumstances may any person supervising or administering a Ministry Fund make a distribution that directly or indirectly benefits himself or herself, or his or her family. All such distributions are strictly prohibited.

Record Keeping. The Administrator of each Ministry Fund shall ensure that complete records of all deposits, withdrawals and transfers of monies are maintained and complete information is promptly given to the staff person responsible for recording the transactions on the books of Church. It is the responsibility of the Administrator to ensure that the donor's intent is properly transmitted to the Director of Accounting or the Director of Accounting's designee prior to deposit in any Church fund if a donation with a restriction or for a specific purpose is received. For example, if the Administrator of the ABC Ministry Fund receives a donation with the restriction that it be used for "[specified purpose]", this purpose must be transmitted to the Director of Accounting or his/her designee prior to the deposit of the donation into any Church fund.

6. Independent Audit. Each year, the audit of the financial statements of the congregation will include an examination of the records of Ministry Funds. This audit must be in accordance with the

⁵ Canons of the Diocese of Dallas Section 14.11 It shall be the duty of the Vestry to take charge of the property of the Parish and its endowments; to regulate all its temporal concerns; in accordance with the Constitution and Canons, to elect and call a Rector and to provide for his support; to provide for paying all Canonical Assessments on the Parish; and in general, to act as helpers to the Rector in whatever is appropriate to Lay persons for the furtherance of the Gospel--it being understood always that the spiritual concerns of the Church are under the exclusive direction of the Rector, subject to the Ecclesiastical Authority and Canons of the Diocese.

requirements of Canon 29.4 (or any successor provision) of the Diocese of Dallas, subject to obligations to keep certain information confidential pursuant to Section II.A.9 (or any successor provision) of the Customary of the Diocese of Dallas and the confidentiality standards recognized by The Episcopal Church and the State of Texas. This review protects both the Administrators and the congregation from any inadvertent practices that might not conform to the policies and standards established by the congregation. The audit must be carried out in a balanced manner so as to protect the confidentiality of the individuals concerned but with sufficient information available for the auditor (or parish self-audit committee) to determine whether the funds are being used in compliance with both congregation and IRS guidelines.

The auditing firm (or parish self-audit committee) will provide the Treasurer of the congregation with a written report each year of the findings of the review of the records of the Ministry Funds, such report to be distributed only to the Rector, Senior Warden, Junior Warden, and such other persons as the Treasurer and the Wardens may determine. This group will review matters of concern arising out of the review, if any. If necessary, the Treasurer will review any matters of concern with the Finance Committee of the congregation, which will determine what action, if any, may be appropriate. The Treasurer and Senior Warden will discuss the matter with the Administrator and the Rector (or Priest in Charge); or if such matters concern the Rector (or Priest in Charge), the discussion will be among the Rector (or Priest in Charge), the Treasurer, the Senior Warden, and the Junior Warden. If required, appropriate corrective action will be taken.

Note that the annual review described above does not satisfy the requirement for the preparation of the Wardens' Report on the Rector's Ministry Fund which requires the Senior Warden and the Junior Warden to certify that they have "reviewed each line item of the Rector's Ministry Fund expenditures."

7. Deviations from Policy. Any deviation from this Policy or of guidelines or procedures for specific Ministry Funds shall require prior consultation with the Rector and Wardens. In the event there is any potential question with respect to IRS or tax related issues or the legal propriety of a disbursement, the Chancellor of the congregation or the Diocese shall be consulted prior to any payment.

8. Compliance with Laws and Policies. All Ministry Funds shall be used and maintained in accordance with applicable law, the Constitutions and Canons of The Episcopal Church and of the Diocese of Dallas, any applicable governance documents or policies of the congregation, including but not limited to the Restricted Funds Policy.

EXHIBIT “A”
Models of “Ministry Fund Purpose Statement and Guidelines”
Sample Language Only

Distributions to Persons in Need.

Koinonia, Good Samaritan and Rector’s Funds. The Koinonia Fund and the Good Samaritan Fund have been formed for the assistance of persons in need. The Good Samaritan Fund may also provide funds to institutions or organizations to which a taxpayer’s contribution would be deductible under §170 of the Internal Revenue Code and that assist persons in need for purposes and in a manner consistent with the mission of Congregation (“Qualified Institutions”). In addition, one of the approved uses of the Rector’s Fund is to provide assistance to persons in need and Qualified Institutions. These Ministry Funds shall be funded as provided in Section 2. The Vestry, in its discretion, may designate additional Ministry Funds to provide for the assistance of persons in need or Qualified Institutions.

Employees in Need. The Koinonia Fund and Rector’s Fund may be used for assistance to employees of the Congregation in need, the standard being whether the use would be appropriate if made to a parishioner or other non-employee. Distributions from these Funds should not be used to compensate an employee for services rendered, overtime, special projects and other tasks, as these are properly covered by the employee’s compensation package pursuant to Congregation’s budget, and payments made outside the budget must be approved by the Vestry. In addition, except as expressly provided in the Statement of Purpose and Guidelines of a Ministry Fund, monies from Ministry Funds should not be used to make loans to employees of congregation without prior approval of the Vestry. Payments of any type from any Ministry Fund to employees of congregation must often be treated as income to the employee and proper tax documentation should be prepared contemporaneously with any payments to employees; therefore, the Rector (if not the Administrator of the Fund to be used), Senior Warden, Treasurer and Director of Accounting must be consulted prior to any disbursement from any Ministry Fund to or on behalf of an employee of congregation for the purposes of assisting them in times of need; if there is any question or reservation as to the propriety of the disbursement the Treasurer and Chancellor shall be consulted.

Record-keeping and Guidelines. In addition to the record-keeping requirements set forth in Section 4 above, all distributions of monies to individuals from Ministry Funds for the assistance of persons in need will be made using the guidelines set forth on Exhibit A.

Rector’s Ministry Fund. The Rector’s Ministry Fund shall be funded as provided in Section 2. The Rector’s Ministry Fund shall be audited as provided in Section 11, provided, however, that upon the consent of the Chancellor of the Diocese, and in accordance with any terms or procedures requested by the Chancellor of the Diocese, the Fund may be audited by the Wardens each year of the prior calendar year’s activity in the Fund, such audit to be completed no later than the date of the Annual Parish Meeting. Pursuant to such an audit the Wardens will certify that each line item has been spent in accordance with the Statement of Purpose and Guidelines of the Rector’s Ministry Fund and this Policy. Any disbursements made for human need as provided in Section 5 shall be made in accordance with Exhibit B.

EXHIBIT B
DISTRIBUTIONS TO PERSONS IN NEED
RECOMMENDED PROCEDURES

If the reason for a distribution from an appropriate Ministry Fund is to assist an individual or family in need the following procedures and guidelines must be followed: ⁶

1. Due Diligence and Documentation. The Administrator should perform adequate due diligence to determine that the intended use of the Ministry Fund meets the guidelines set forth in the Ministry Funds Policy and the Statement of Purpose and Guidelines of the Ministry Fund intended to be used. In addition, the Administrator should determine whether the intended beneficiary has a genuine need, including obtaining proper documentation substantiating the need. Copies of all supporting documentation should be kept by the Administrator for 10 years after the disbursement. Examples of proper documentation include the following:

a. *Utility/Telephone Payments.* The Administrator should obtain the original utility or telephone bill. congregation will send the payment, along with any payment coupon or stub, directly to the utility or telephone company.

b. *Rent/Mortgage/Motel Payments.* The Administrator should contact the landlord, lender or motel to verify the amount owed and that the beneficiary is occupying the premises. In the case of a lease, the Administrator should request a copy of the lease. In the case of a motel, the Administrator should obtain an original bill or invoice. In the case of a mortgage payment, the Administrator should obtain the original bill, coupon or statement. The Church will send the payment, along with any payment coupon or stub, to the appropriate party.

c. *Medical, Dental or Counseling Bills.* The Administrator should obtain the original medical, dental or counseling bill or invoice. Church will send the payment, along with payment coupon or stub, to the service provider.

d. *Pharmacy.* The Administrator should obtain the original prescription if possible and make a copy of the prescription for Church's records. The Administrator should call the pharmacy to determine the cost of the medication. Church will draft a check payable to the pharmacy.

e. *Gift Certificates.* Gift certificates should be used rarely for individuals who are not members of the Church because experience has shown that gift certificates are often sold on the street by the beneficiary and the money used for purposes not intended by the Administrator. In certain instances, however, gift certificates may be appropriate. The Administrator should draft a memo describing the reason for the gift certificate, amount and

⁶ These procedures and guidelines may be amended or updated by the Rector, Senior Warden, Treasurer and Chancellor solely for the purpose of ensuring that the procedures and guidelines conform to the procedures and guidelines promulgated by the Episcopal Church, the Diocese of Dallas, the Internal Revenue Service or other appropriate authority without prior approval of the Vestry; *provided, however*, that the Vestry, Clergy and Director of Operations shall be promptly informed of any changes made to this Exhibit.

intended use. The Church will purchase the gift certificate and give it to the Administrator for delivery to the beneficiary.

f. *Bus Passes/Other Vouchers.* The Administrator should draft a short memo describing the reason for the pass or voucher (e.g., to send a parishioner to a medical facility or a homeless person to a downtown shelter).

g. *Cash Payments.* Cash payments may be made upon occasion in small amounts (generally not more than \$20) when it is not feasible to draft a check (e.g., an immediate need for a meal). The Administrator should request that the proper amount be transferred out of the Ministry Fund to reimburse to source of the cash (e.g., cash on hand at Church). A memo describing the amount of and reason for the payment should be drafted for Church's records. Cash payments should be distributed rarely because of liability issues.

It is recognized that the protocol for cash payments may, for practical reasons, need to vary from parish to parish, particularly those congregations at locations that are subject to a significant amount of "walk-in traffic" seeking aid for a meal and the gifts are in the amount of \$5.00 to \$10.00. A ledger should still be maintained recording each gift much in the way an office would handle its petty cash fund.

2. *Payments.* The general rule is that payments should not be made directly to the beneficiary, but rather to the utility, landlord, healthcare provider, etc. If the payment cannot be made directly to the creditor and confidentiality considerations dictate that a check cannot be drafted to the beneficiary, the Administrator may have the check drafted to payable the Administrator or in some other fashion approved by the Chancellor and make the payment in an appropriate manner. Such circumstances should be rare.

3. *Maximum Payments.* Disbursements for the benefit of an individual in need, including amounts paid to or for the benefit of the members of that individual's family living together as a family unit, shall not exceed the amount provided in the Statement of Purpose and Guidelines of the relevant Ministry Fund. An Administrator may determine in his or her discretion that a lower maximum amount should apply to any individual or family unit requesting assistance.

4. *Confidentiality.* Administrators should always ensure that proper confidentiality be maintained. When the Administrator deems it appropriate that confidentiality should be maintained, the name of the beneficiary and other identifying information should be "blacked out" in any supporting documentation presented to the accounting staff of the Church with the check request or shared with anyone other than the Administrator. In such instances, however, the Administrator should retain a copy of the complete supporting documentation in confidential files accessible only to the Administrator, with the name and identifying information remaining intact. The Fund's records should indicate that the Administrator is maintaining the supporting documentation for reasons of confidentiality.

EXHIBIT C
[SHORT NAME OF CHURCH]
WARDENS' REPORT ON THE
RECTOR'S MINISTRY FUND
YEAR _____

To: [Short Name of Church] Vestry

We, the undersigned Senior Warden and Junior Warden, hereby certify that we have reviewed each line item of the expenditures of Rector's Ministry Fund for the calendar year 20__ and that all expenditures were made in accordance with the [Short Name of Church] Ministry Funds Policy and the Statement of Purpose and Guidelines of the Rector's Ministry Fund. In doing so, we report that the total contributions made to the Fund were \$_____ and that the total disbursements were \$ _____. At as of December 31, _____, the balance on hand in the Fund was \$ _____.

[name of Senior Warden], Senior Warden

Date

[name of Junior Warden], Junior Warden

Date

This certification is to be completed and presented to the Vestry prior to the date of the Annual Parish Meeting in the year following the calen