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BOOK OF COMMON PRAYER

Since it is the historic practice and continuing intention of the church to have one authorized Prayer Book in use throughout the church in its regular worship, and since all congregations have had ample opportunity to become familiar with the new Book, the 1979 Book of Common Prayer is the one Book authorized in the Diocese of Alaska for use in the regular, public worship of the church. Specifically, this includes celebrations of the Holy Eucharist, Morning and Evening Prayer, Baptism, Confirmation, and the “Episcopal Services.”

This does not rule out the use of one of the above services from a historic Prayer Book or that of a another member of the Anglican Communion on some historic or other special occasion, when the Bishop has given permission.

When pastoral considerations warrant it, texts from a historic Prayer Book or that of a another member of the Anglican Communion may be used in any ministrations to the sick, in services held in nursing homes or similar institutions; and, when families request it, at weddings and funerals; all at the discretion of the priest.

COMMUNION OF BAPTIZED CHILDREN

In 1970 the church decided that it was not appropriate to deny communion to baptized children and require them to wait until after they were confirmed. The admission of children to communion was encouraged by both Bishop Gordon and Bishop Cochran. And yet, occasionally questions arise about this practice and it seems appropriate to say something about it at this time.

Ideally, the admission of a child to communion is the result of a carefully arrived at decision in a consultation between the parents, the local priest, and the child him/herself. The parents are the principal teachers of the children and, of course, the most obvious way parents do this is by their own example as devoted and reverent communicants. Cergy, and parishes, should not regiment children of a certain age, or grade in school, into a first communion instruction process. Age limitations are left to the judgment of parents and clergy.

Different families will respond to this opportunity for including their children in the full range of Christian worship experience in different ways, and we may have a degree of pluralism, where some parents want their children to receive at a relatively early age, some at a relatively later age, and some more conservative parents wanting their children to be confirmed first. We must not sit in judgment on the decisions that are reached by an individual family in consultation with their priest, but be patient with one another if our perceptions and judgments are different in this regard. The Bishop is happy to give individual counsel to any priest, or parent, in the diocese should questions arise about the communion of baptized children.

CONFIRMATION STANDARDS

Confirmands will know the following prior to confirmation:

1. The Ten Commandments will be memorized and understood. They will know the summary of the Law and the Two Great Commandments.
2. The Lord's Prayer will be memorized and understood. They will know what the prayer means and be able to explain why it is important. They will also know the importance of prayer.
3. The Apostle's Creed will be memorized and understood. They will be able to explain why it is important and what it tell us about our faith.
4. They will know what the Baptismal Covenant means.
5. They will have memorized John 3:16 and be able to explain its meaning.
6. They will be familiar with the Books of the Bible and at a minimum be able to recite the names of the Gospels.
7. They will be able to explain the difference between the Old Covenant and the "New Covenant".
8. They will be able to name the seven sacraments and fully explain the two "Great Sacraments".
9. They will be instructed in the appropriate way to receive Holy Communion.
10. They will be familiar with Alaska Episcopal Church history and at a minimum know the history of their church.
11. They will know what it means to be a disciple and explain how they intend to live into discipleship.
12. They will complete Confirmation Activities: 1) Practice "Christian charity" by doing a small project that can be done individually or collectively. For example, they could visit the elderly and perform a "good deed" for them. 2) They will write a short prayer that gives thanks for the blessing of life. 3) They will compose a letter to the Bishop stating why they want to be confirmed.

EPISCOPAL VISITS

The following guidelines are intended to help congregations prepare ahead of time for Bishop's visit. The four main parts of the visit include: worship services, oversight meetings, record review, and pastoral visits or gatherings. Each of these areas is described below.

In addition, we have included excerpts from an article, *The Role and Qualities of a Bishop*, by The Rt. Reginald Hollis, former bishop of Montreal. We hope it will give church leaders a deeper appreciation of how a bishop brings the universal Church to local communities, and then connects individual parishes to the diocese and the Church universal.

Worship

1. The most important part of the visit is to worship God and to engage the Gospel as disciples of Jesus in a sacred circle.
2. The Bishop will normally preside at the Holy Eucharist as principal celebrant and preacher. The rector/vicar or priest in charge will concelebrate along with other clergy who serve or are related to the congregation.
3. As the prayer book recommends, the Bishops visit is a time for Baptisms.
4. Baptism and/or confirmation will be combined with the Eucharist when there are candidates.
5. The propers of the day, with the 3 appointed Scripture lessons and Psalms, will normally be used.
6. If there is a Baptism, the Bishop will preside, and will perform the baptism with the local priest.

When adult candidates or older children are presented for Baptism, they will be baptized, receive the laying on of hands and signation with chrism, be presented with a cross, and receive their first communion at the visitation service.

Oversight Meetings

During a normal visitation, the bishop wants to meet with as many church leaders and members as possible, including the following:

1. With the clergy or lay person in charge (rector, vicar or warden), other clergy related to the congregation, Vestry or Church Committee, delegates to Diocesan Convention and General Convention, and when possible members of the Society of St. Simeon & St. Anna.

2. Christian Education Leaders. Clergy and lay leaders should be prepared to report on Christian education activities and plans for all ages. When convenient (with advance planning) the Bishop would enjoy visiting, observing, or teaching in a class or other education program. This report should include information on congregation's stewardship education program in the light of the church's teaching that the Biblical tithe is the minimum standard of giving for members of the Episcopal Church.
3. Those preparing for Confirmation and those recently confirmed. (See confirmation guidelines)
Special meetings, pastoral visits and blessings may be arranged.

Records

The Bishop will want to review at the meeting the congregation's official records:

1. Service book.
2. Parish register. (record of baptism, confirmation, marriage, burial and membership record)
3. Vestry or Church Committee minutes for meetings since last visitation.
4. Financial reports and records and current audit for most recent year.
5. Budget for current year.
6. Report and minutes for last annual meeting.
7. Parochial reports.

Pastoral

1. The Bishop welcomes an opportunity to meet the general congregation at a coffee hour, potluck or other occasion. Time should be allowed for the Bishop to speak informally on matters of current concern and respond to questions.
2. As time allows, the Bishop will visit the sick and shut-in and do house blessings and other blessings.
3. The Bishop is pleased to meet local public officials and the clergy and lay leaders of other denominations.

Note: The Bishop may designate a staff member or other persons to perform any and all of the functions (Other than Confirmation) mentioned above.

CHURCH OFFICER LIST FORM

Year _____

The purpose of this form is to keep the bishop and diocesan staff current on the leadership in your congregation. This form should be filled out at the beginning of each year and mailed to: The Episcopal Diocese of Alaska, 1205 Denali Way, Fairbanks, AK 99701.

Church Name: _____

Street Address: _____

Mailing Address: _____

City: _____ Zip: _____

Email Address: _____

Web Address: _____

Sr. Warden:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Epiphany/Newsletter Reporter:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Jr. Warden:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Christian Education:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Secretary/Clerk:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Altar Guild:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Treasurer:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Episcopal Relief and Development Fund:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Episcopal Church Women:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Property Liason:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

United Thank Offering:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Church Periodical Club:

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

Address: _____
 Phone: _____ (H) _____ (W)
 Email: _____

CONTINUING EDUCATION/SABBATICAL

Continuing education is of the highest importance in helping clergy remain competent, committed and pastorally sensitive. Training and education experiences are of value to the individual, to the congregation and to the diocese providing new skills, new learnings, and renewed enthusiasm for leadership. Short term continuing education possibilities are widely available and participation is strongly encouraged and supported by congregations and the diocese.

The Sabbatical Leave of Absence is a longer, intentionally designed program directed at individual, intellectual, spiritual and personal growth. The Commission on Mission and Ministry recommends the following guidelines for sabbatical leave.

1. A sabbatical leave of three to four months after at least 5 years of service may be initiated by an individual or may be made part of a covenant between a congregation and a clergy person. Additional leave for a longer period of service is possible, but not to exceed a total of six months.
2. The financial support for the sabbatical leave will be built on a three-way system, with the individual, the congregation and the diocese all contributing. For stipendiary clergy, salary and

benefits will continue in full during the course of the sabbatical. The parish (congregation) assumes the responsibility for covering the ministry tasks of the person taking sabbatical, during that person's absence.

3. Application for sabbatical leave is required one year before the intended sabbatical, through formal contact with the Commission on Mission and Ministry. Approval of the Commission is required before diocesan funds are granted.
4. The long-range planning includes sharing initially with the bishop, vestry and members of the congregation what is intended by the individual for the sabbatical leave. The sabbatical need not be achievement oriented. Reasons for leave may be rest, renewal, exploration of undeveloped skills or a change of pace. The sabbatical is planned as part of an overall continuing education program.
5. Part of the planning for sabbatical leave is to be intentional about return and re-entry to the congregation and diocese. A way to reflect, respond and report to co-workers, congregation and diocese is part of the structure for sabbatical leave. Keeping in touch with friends, congregation, bishop and diocese is of great

DISCERNMENT PROCESS-PAGE 1

In accordance with the Commission on Ministry of the Diocese of Alaska, each person desiring ordination or Holy Orders shall consult with the member of the Clergy in Charge. Gospel Based Discipleship is the central resource for the discernment process.

“The Bishop and the Commission on Ministry (COM) shall provide encouragement, training and necessary resources to assist each congregation in developing an ongoing process of community discernment appropriate to the cultural background, age and life experiences of all persons seeking direction in their call to ministry.”

The following process will be used:

1. The Aspirant must be a communicant in good standing and an active member of the host congregation for at least one year before beginning the Discernment Process.
2. At this point in the call process, it is appropriate for the Aspirant to discuss a sense of call only with the Rector/Vicar of the host congregation and the members of the Gospel Based Discipleship (GBD) Discernment Committee, so as not to influence the process in later steps. There will be a period of discernment between the Rector/Vicar and the Aspirant that shall precede the calling forth of a GBD Discernment Committee.
3. Each new Aspirant shall have his/her own GBD Discernment Committee.

4. The Aspirant shall meet with the GBD Discernment Committee of a period of no less than 12 months.

5. The GBD Discernment Committee shall be comprised of no less than 4 lay persons from various walks of life representing a cross-section of the congregation. It is suggested that at least one member come from other Episcopal or non-Episcopal congregations, preferably of a size different from the discerning congregation.

6. During aspirancy, the Aspirant shall engage in spiritual direction with a spiritual advisor. The Rector/Vicar must be consulted in selecting the appropriate advisor. The name of the advisor shall be made known to the Bishop.

7. The Aspirant shall plan and execute a “ministry/service project” as called by engaging the Gospel with the GBD Discernment Committee. This project will be supervised by the Rector/Vicar and at least one member of the GBD Discernment Committee.

8. The GBD Discernment Committee would meet at least once per month with the Aspirant. The primary focus should be:

- To engage the Gospel in a circle of love and prayer.
- The Aspirant's life story. Explore deeper insight into the Aspirant's spiritual journey.
- Study time on the nature of ministry. An intensive and sustained reflection on the services of ordination in the Book

DISCERNMENT PROCESS-PAGE 2

of Common Prayer is suggested. Other study sources are available from the Bishop’s Office.

- The Aspirant’s spirituality, relationship to authority, ego needs, leadership style, personality type, gifts and skills.
- It is further recommended that the Aspirant experience the breadth of the Episcopal Church. Therefore, Sunday visits to at least three other congregations (to be identified by the Aspirant and the Rector/Vicar) one of these outside of the Aspirant’s deanery are suggested.
- The Aspirant’s knowledge of the faith and practice of the Episcopal Church.
- The Aspirant’s description of his/her call to ministry.
- Practical matters – the Aspirant’s support network including income, family, ministry goals, etc.

9. When discernment has been completed, the chair of the GBD Discernment Committee will complete the “GBD Discernment of Ministry Form” found in the diocesan directory. This

completed form and the recommendation of the Discernment Committee must then be submitted to the Vestry or Bishop’s Committee. The Vestry or Bishop’s Committee receives the report to assess the work of the GBD Discernment Committee.

If the recommendation is for ordained ministry, the Vestry or Bishop’s Committee completes Form B-01, “Recommendation for Postulancy,” and sends it to the Bishop and the Chair of the Commission on Ministry (COM). The Chair of the COM and Bishop will then determine if an interview with the Aspirant is needed and arrange for that to occur. This interview may be conducted by the whole COM or by a designated interview committee. Canon III, Title 6, nominees do not need to be interviewed by the COM before being admitted to Postulancy.

10. The Bishop may then accept or not accept the Aspirant for Postulancy with or without the consent of the COM.

Revised and approved by the COM on April 2, 2004

STEPS TO ORDINATION TO THE PERPETUAL DIACONATE-PAGE 1

Canon 6

Name _____ Tel. no. _____

Address _____

A confirmed adult communicant in good standing may be nominated for ordination to the diaconate by the person’s congregation or other community of faith.

1. _____ Nomination – the person must be nominated by their congregation or other community of faith. Nomination must be in writing and must include a letter of support committing to: a) pledge to contribute financially to their preparation and b) involve itself in the nominees preparation for ordination. This letter must be signed by two-thirds of the vestry/Bishop’s Committee and by the clergy or leader exercising oversight.

Date received: _____

2. _____ Nominee’s acceptance – the nominee shall accept the nomination in writing and must complete Form A, Application for Holy Orders. Date received: _____

3. _____ Postulancy – the time between nomination and candidacy and it begins the formal preparation for ordination. Postulancy involves continued exploration of the decision about the call to the Diaconate. Before granting admission as a Postulant, the Bishop shall: a) determine that the Nominee is a confirmed adult communicant in good standing and b) confer in person with the nominee. The bishop may approve the Nominee’s proceeding into Postulancy. If approved for postulancy the COM will review application and evaluate qualifications to pursue program of preparation for ordination.

4. _____ Interview with the COM or committee of the COM. Date of interview: _____

STEPS TO ORDINATION TO THE PERPETUAL DIACONATE-PAGE 2

5. _____ COM presents evaluation and recommendation to the Bishop. Date completed: _____

6. _____ Bishop may admit Nominee as a postulant. Date admitted: _____

Date letters sent: _____

7. _____ Ember Week letters – each person in the process for Holy Orders shall communicate with the Bishop in person or by letter four times per year in the Ember Weeks:

St. Lucy’s Day (Dec. 14) _____
year: _____

Ash Wednesday _____
year: _____

Day of Pentecost _____
year: _____

Holy Cross Day (Sept. 14) _____
year: _____

8. _____ Candidacy – is the time of education and formation, in preparation for the ordination to the Diaconate.

_____ Application in writing to the Bishop – date: _____
(Must include date of admission to postulancy and a letter of support from the congregation, signed and dated by two-thirds of the vestry/church committee and clergy /leader having oversight.)

_____ Written statement from COM attesting to the continuing formation of the Postulant – date: _____

_____ Interview and approval of Standing Committee. Date: _____

_____ Bishop may admit the Postulant as a Candidate for Ordination. Date notices sent: _____

9. _____ Preparation for Ordination – the Bishop and the COM shall work with the Postulant or Candidate to develop and monitor a program of preparation for ordination to the Diaconate. Preparation shall include the five general areas:

- a) Academic studies including the Holy Scriptures,, theology, and the traditions of the Church.
- b) Diakonia and the diaconate.
- c) Human awareness and understanding.
- d) Spiritual development and discipline.
- e) Practical training and experience.

STEPS TO ORDINATION TO THE PERPETUAL DIACONATE-PAGE 3

Other required training:

- _____ prevention of sexual misconduct/
_____ civil requirements for reporting and pastoral opportunities for responding to evidence of abuse.
- _____ the Constitutions and Canons of the Episcopal Church, particularly Title IV
- _____ the Church’s teaching on racism

10, _____ Evaluation – COM shall authorize someone(s) to be in charge of the candidate’s evaluation. Written reports shall be made to the COM as often as they deem necessary.

11. _____ Certification – to be made by person(s) in charge of the Candidate’s program stating that the Candidate has successfully completed preparation and is ready for ordination.

12. _____ Final Written Assessment / readiness for ordination – shall be prepared as determined by the Bishop in consultation with the COM. This report shall include a recommendation from the COM regarding the readiness of the Candidate for Ordination.

13. _____ Evaluations, assessments, recommendations shall be made available to the Standing Committee.

13. _____ Background Check

14. _____ Medical Evaluation

15. _____ Psychological Evaluation

16. _____ Ordination – person may be ordained Deacon after at least eighteen months from the time of written acceptance of the nomination by the Nominee and must be at least 24 years of age.

Bishop must obtain in writing and provide to the Standing Committee:

- _____ application from the Candidate requesting ordination
- _____ a letter of support from the Candidates congregation or community of faith
- _____ written evidence of the dates of admission for postulancy and candidacy
- _____ certificate from seminary or other program of preparation showing the scholastic record in the subjects required by the Canons and giving an evaluation with recommendation as to the Candidate’s personal qualifications.
- _____ certificate from the COM giving a recommendation regarding ordination

17. _____ Standing Committee Consent – date: _____

STEPS TO ORDINATION TO THE PRIESTHOOD-PAGE 1

Canon 8

Name: _____ Tel.# _____

Address _____

A confirmed adult communicant in good standing may be nominated for ordination to the priesthood by the person's congregation or other community of faith.

1. Nomination – the person must be nominated by their congregation or other community of faith. Nomination but be in writing and shall include a letter of support committing to: a) pledge to contribute financially to their preparation and b) involve itself in the nominees preparation for ordination. This letter must be signed by two-thirds of the Vestry/Bishop's Committee and by the clergy exercising oversight.

Date received: _____

2. Nominees's acceptance – the nominee shall accept the nomination in writing and must complete Form A, Application for Holy Orders. Date received: _____

3. Postulancy: the time between nomination and candidacy and may initiate the formal preparation for ordination. Postulancy involves the continued exploration of the decision about the Postulant's call to the Priesthood.

Bishop shall:

- _____ determine that the person is an adult communicant in good standing
- _____ confer with the nominee
- _____ consult with Nominee regarding financial plan for preparation for ordination

4. Interview with COM – only if the Bishop approves proceeding. Date of interview: _____

5. _____ Evaluation from COM Date received: _____

6. _____ Bishop may admit the Nominee as a postulant Date _____

- Letters to: _____ Postulant
- _____ Oversight clergy
 - _____ COM
 - _____ Standing Committee
 - _____ Seminary, if applicable, or
 - _____ Director of Postulants program of preparation

7. _____ Ember Week letters – each person in the process for Holy Orders shall communicate with the Bishop in person or by letter four times per year in the Ember Weeks:

St. Lucy's Day (Dec. 14) _____ year: _____

Ash Wednesday _____ year: _____

STEPS TO ORDINATION TO THE PRIESTHOOD-PAGE 2

Day of Pentecost _____
 year: _____

Holy Cross Day (Sept. 14) _____
 year: _____

8. Candidacy – is a time of education and formation in preparation for ordination to the Priesthood, established by a formal commitment by the Candidate, Bishop, COM the Standing Committee, and the congregation or other community of faith.

- _____ Application – Postulant must apply to the Bishop and shall include:
 - _____ Postulancy date
 - _____ Letter of support from congregation signed by two thirds of the Vestry/Bishop’s committee and the clergy member with oversight.

Date received: _____

- _____ Statement from COM attesting the continuing formation of the Postulant.
- _____ Approval in writing from Standing Committee. An interview is required
 - By the Standing Committee and they shall have had the opportunity to Review the documentation relating to the Postulant.
- _____ Bishop may admit Postulant as a Candidate
 - Date: _____

- Letters to: _____ Candidate
 _____ Oversight clergy
 _____ COM
 _____ Standing Committee
 _____ Seminary, if applicable, or
 _____ Director of Postulants program of preparation

9. Preparation for Ordination – the Bishop and the COM will work with the Postulant or Candidate to develop and monitor a program of preparation for ordination. This program must include provision of pastoral guidance.

- _____ Academic work if needed.
- _____ Theological training
- _____ Practical experience
- _____ Emotional Development
- _____ Spiritual Formation
- _____ Prevention of Sexual Misconduct
- _____ Civil requirements for reporting an pastoral opportunities for responding to evidence of abuse.
- _____ The Constitutions and Canons of the Episcopal Church, particularly Title IV
- _____ The Church’s teaching on racism

STEPS TO ORDINATION TO THE PRIESTHOOD-PAGE 3

10. Evaluations

- _____ Academic at least once per year (seminary or other formation program)
- _____ Background check
- _____ medical
- _____ psychological

11. Ordination to the Diaconate

The Bishop shall provide to the Standing Committee:

- _____ An application requesting ordination
- _____ letter of support from congregation/community of faith
- _____ written evidence of dates of Postulancy and Candidacy
- _____ certificate from seminary or other program of preparation showing scholastic record in subjects required by the Canons, and giving an evaluation with recommendations as to other personal qualifications for ordination
- _____ a certificate from the COM giving a recommendation regarding ordination to the Diaconate under this Canon.
- _____ Standing Committee consent and certification

12. Ordination to the Priesthood

The Bishop shall provide to the Standing Committee:

- _____ an application requesting ordination, including dates of Postulancy, Candidacy and ordination as a deacon
- _____ a letter of support from the congregation/community of faith
- _____ evidence of admission to Postulancy and Candidacy and ordination to the Diaconate
- _____ certificate from seminary or other program of preparation showing scholastic record in subjects required by the Canons, and giving an evaluation with recommendations as to other personal qualifications for ordination
- _____ a statement from the COM attesting to the successful completion of the program of formation and proficiency in the required areas of study and recommending the deacon for ordination to the Priesthood.

13. Standing Committee consent and certification. Date _____

14. Date of Ordination to the Priesthood: _____

APPLICATION FOR HOLY ORDERS FORM A-07 (PAGE 1)

The Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, AK 99701
1-907-452-3040

*Application for Holy Orders
Form A - 07*

(This form is to be completed once your congregation or community of faith has nominated you for Holy Orders.)

To: The Bishop

Name: _____ Date of Birth _____

Place of Birth _____ Sex ____F ____M

Address _____

City/State/Zip _____

Telephones (including area code): _____(h) _____(w)

Email: _____

Congregation _____

Priest: _____

Former denomination (if applicable) _____

Date of Baptism: _____ Denomination _____

Baptized by: _____
(Please attach copy of certificate)

Date of confirmation/reception into the Episcopal Church _____

Place of confirmation/reception _____
(Please attach copy of certificate)

How many years have you lived in Alaska: _____

Education History:

High School: _____ Graduation date _____

College: _____ Graduation date _____

Major: _____ Degree _____

Graduate work _____ Degree _____ Date(s) _____

** Please attach transcripts of your most recent degree with this form.

APPLICATION FOR HOLY ORDERS FORM A-07 (PAGE 2)

Are you a previous applicant for Postulancy? ____No ____Yes.

If yes please give details:

Are you ordained in another denomination? ____No ____Yes. If yes, please give details including years of service:

Please provide the following:

- A description of the process of discernment by which you have been identified for ordination to the diaconate/priesthood (circle one).
- A letter of support from your congregation or other community of faith, including a statement committing the congregation or other community of faith to involve itself in your preparation for ordination to the diaconate/priesthood (circle one). If the letter is from a congregation, the letter shall be signed and dated by a two-thirds majority of the Vestry/Bishop’s Committee, and the member of the Clergy or leader exercising oversight. This letter must be signed and dated at a meeting duly convened, and attested by the Clerk of the Vestry/Bishop’s Committee.
- A letter accepting your nomination.

Date of application: _____

Date received by the Bishop: _____

(Revised 01/2007)

GBD DISCERNMENT OF MINISTRY FORM—PAGE 1

Date: _____

Name of Applicant: _____

Name(s) of Parish Commission on Ministry (PCOM) members who recommend that the applicant pursue ordination to the Diaconate/Priesthood.

Name(s) of PCOM members who do not recommend that the applicant pursue ordination to the Diaconate/Priesthood.

1. Describe the applicant’s strengths and weaknesses.

2. Assess the applicant’s intellectual ability to pursue graduate studies in theology.

3. Describe the applicant’s family situation, including how spouse, children and parents feel about his/her pursuit of ordination to the diaconate/priesthood.

4. Describe the applicant’s religious history before entering the congregation.

5. Describe the applicant’s life and ministry in this congregation>

GBD DISCERNMENT OF MINISTRY FORM—PAGE 2

6. Assess the applicant’s potential for leadership in the church.

7. Assess the effectiveness of the applicant in pastoral and interpersonal relationships in the congregation.

8. Summarize your understanding of the applicant’s call to ordination.

9. Summarize the major strengths/attributes of the applicant as possible future Deacon/Priest in the Church.

10. Summarize the major weaknesses, problems of the applicant as a possible Deacon/Priest of the Church.

11. Add any other comments you feel the Rector and Vestry should know.

RECOMMENDATION FOR POSTULANCY FORM B-01 (PAGE 1)

The Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, Alaska 99701
907-452-3040

*Recommendation for Postulancy
Form B-01 - Page 1*

To: The Bishop

Name of Congregation _____

Date of meeting: _____ Place _____

We (rector/priest and two-thirds majority of the Vestry), whose names are hereunder written, testify to the best of our belief and personal knowledge that _____ has been duly discerned by a committee of this congregation; and that she/he is a communicant of this Parish in good standing for a minimum period of a year. We do furthermore recommend further discernment of the applicant for Holy Orders by the Diocese, and admission as a Postulant for Holy Orders. We base our decision on the attached documentation and recommendation of the congregation discernment committee. Furthermore, we commit to be involved with _____ (name of person) preparation for ordination and we pledge to contribute financial support for that ordination.

Signed: _____

Priest: _____ Print name _____

Attestation of Clerk or Recording Secretary:

I hereby certify that the foregoing certificate was signed at a meeting of the Vestry of _____ Parish, _____

duly convened at _____am/pm on the _____ day of _____, _____, and that the names attached are those of all (or a two-thirds majority of all) the members of the Vestry.

Signed: _____(Clerk/Secretary of Vestry)

LAY LEADERSHIP IN WORSHIP AND LAY READERS

Currently Under Revision—Awaiting approval of the Standing Committee and the Commission on Mission & Ministry

Lay Eucharistic Ministers

The purpose of this canon, and the ministry that it intends, is to enable the ministry of trained lay persons to include in the Eucharistic assembly those who, by reason of illness or infirmity, are unable to attend.

This canon was intended to raise up one or more persons in each congregation for this ministry. The administration of home or private communions by Lay Eucharistic Ministers should be an extension of the principal Eucharist in a congregation. Those receiving their communions in this fashion should be included in congregational prayers and the assembled community should see the Lay Eucharistic Minister receive the sacrament at the altar and go forth from the congregation.

Selection of Persons: Clergy should recruit persons for this ministry with the advice of their vestry or a church committee. It should be stressed, in discussing this with persons so recruited, that this is not a lifetime privilege or license.

Training: Those recommended for licensure should be carefully trained in the areas of functional, spiritual and pastoral aspects of this ministry.

Functional Training: A careful study of the canon, the guidelines, and the rite of Communion under Special Circumstances, should be carried out by all concerned. It might be well for those being trained to actually observe the priest, or others, in the performance of this ministry. It is necessary to use appropriate vessels to carry the sacrament from the altar. Consecrated elements left over should either be consumed or returned immediately to the church in their appropriate containers.

Spiritual: Careful instruction in the meaning and centrality of the Holy Eucharist should be undertaken, with appropriate support from Scripture. The communal character of the church should also be given careful attention.

Pastoral: Careful instruction should be given about the particular needs and problems of the aged, ill and infirm members of the congregation. It is envisioned that a degree of continuity should be strived for in this ministry, so that a predictable pattern of ministry might come to be expected by the persons receiving the sacrament, whether on a weekly, bi-monthly, or monthly basis.

Supervision: If there is a deacon in the congregation, this would normally be the deacon's responsibility. But, in the absence of a deacon, the priest is responsible for supervising and directing this ministry of those persons so licensed.

Licensing and Commissioning: It would be appropriate to commission those persons who are to be licensed to this ministry during the next scheduled Episcopal visitation. Please describe the training the person has received when submitting a letter of recommendation.

Term of Service: As with Lay Readers, a term of service would not exceed three years, and could be for a shorter time.

Resources: The canon itself and the Book of Common Prayer are helpful. In addition, the diocesan office of Christian Learning has additional resources available for use. The ministry envisioned here is a serious and demanding one, which should not be undertaken unadvisedly or lightly by either lay people or clergy.

1. Lay Eucharistic Ministers must be adult confirmed communicants in good standing, be carefully chosen and trained, and be specially licensed. A candidate is to be recommended by the cleric in charge of the congregation to the Bishop.
2. Where a deacon serves in a congregation, that minister should supervise the work of the Lay Eucharistic Ministers.
3. It is recommended that those receiving communion from a Lay Eucharistic Minister be prayed for specifically in the Prayers of the People by the congregation on that day.
4. The administration of the Sacrament to the persons visited should take place immediately after the service in the church. Following the

communion of the people, the Lay Eucharistic Ministers come forward and are discharged with the following or similar words:

**In the name of this congregation,
I send you forth bearing these holy gifts,
that those to whom you go may share with us
in the Communion of Christ's body and blood.
We who are many are one body, because we
all share one bread, one cup.**

5. A suitable container in which to carry the two vessels for the bread and wine, corporals, and purificators is to be supplied. The container is to be returned immediately to the parish along with any unconsumed elements.

6. The people to whom Holy Communion is to be administered are to be notified in advance and the time of the appointment clearly set.

7. The order of the Book of Common Prayer rite "Communion under Special Circumstances", amended as appropriate, is to be used.

Concerning the Rite: The Book of Common Prayer affirms the place of the Holy Eucharist as "the principal act of Christian worship on the Lord's Day and other major Feasts," and thus the foundation of the corporate prayer of the church. As an act of the whole community of faith, the Eucharist is a summons to all the baptized to share in the table of the Lord. This form for the distribution of Holy Communion by licensed lay persons is Lay Eucharistic Ministers

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Concerning the Rite. The Book of Common Prayer affirms the place of the Holy Eucharist as "the principal act of Christian worship on the Lord's Day and other major Feasts," and thus the foundation of the corporate prayer of the church. As an act of the whole community of faith, the Eucharist is a summons to all the baptized to share in the table of the Lord. This form for the distribution of Holy Communion by licensed lay persons is intended to foster a corporate sense of the Eucharist among those who, by reason of illness or infirmity, are unable to be present on Sunday or some other principal feast.

This service is to be conducted by a duly licensed person immediately following such celebrations of the Holy Eucharist. The General Convention (1985) has specified that "The functions of the Lay Eucharistic Minister shall be limited to the following:

- a) Administering the elements at any Celebration of Holy Eucharist in the absence of a sufficient number of Priests or Deacons assisting the celebrant;
- b) Directly following a Celebration of Holy Eucharist on Sunday or other Principal Celebrations, taking the Sacrament consecrated at the Celebration to members of the Congregation who, by reason of illness or infirmity, were unable to be present at the Celebration.

It is desirable that other parishioners, relatives, and friends also be present to communicate with the person visited. Those so ministered to should also be visited regularly by the clergy of the congregation. In this way, those

who are unable to participate regularly in the worship of the Eucharistic assembly may nevertheless experience their relation to the community and also join their personal faith and witness to that of their community. It is appropriate that the person be invited to join in commenting on the Scripture and in offering suitable prayers during the rite.

Distribution of Holy Communion by Lay Eucharistic Ministers to Persons Who Are Ill or Infirm

This form is to be used only immediately after the principal Eucharist on Sunday or other Principal Celebrations. The Lay Eucharistic Minister should be accompanied by other persons from the congregation.

The Lay Eucharistic Minister greets the people

The Peace of the Lord be always with you.

Response

And also with you.

Collect of the Day

Gospel of the Day, or some other passage of Scripture appropriate to the occasion.

Comments may be made about the sermon of that day.

Suitable prayers may be offered.

A Confession of Sin may be said:

Most merciful God, we confess that we have sinned against you in thought, word, and deed, by what we have done, and by what we have left undone. We have not loved you with our whole heart; we have not loved our neighbors as ourselves. We are truly sorry and we humbly repent. For the sake of your Son Jesus Christ, have mercy on us and forgive us; that we may delight in your will, and walk in your ways, to the glory of your Name. Amen.

Minister May Almighty God in mercy receive our confession of sorrow and of faith, strengthen us in all goodness, and by the power of the Holy Spirit keep us in eternal life. AMEN.

The Lord's Prayer

Administration of the Holy Communion
(Using of the authorized words of administration)

Closing Prayer: O gracious God, whose Christ stretched out arms of love upon the hard wood of the cross to embrace all the peoples of the earth: We give you thanks for feeding N. our sister with the Sacrament of that precious Body and Blood, which is the sign and instrument of our common life, and also for enriching our parish family by her sharing with us the food of our pilgrimage, the foretaste of that heavenly banquet of which we shall partake with all your saints; through Jesus Christ, our Savior. AMEN.

Minister Let us bless the Lord.

Response Thanks be to God.

LICENSED LAY MINISTRY APPLICATION—PAGE 1

For Lay Reader, Pastoral Leader, Lay Preacher, Lay Eucharistic Minister or Catechist -Title III. Canon 3. Please fill out a separate form for each ministry license for which you are applying. This form may also be used when applying for Lay Missioner.

Name (please print) _____

Home Address _____

City _____ Zip Code _____

Congregation _____

Today's Date _____

To the Bishop of Alaska:

I wish to be licensed as a (indicate one of the five ministries) _____. On the reverse side of this form I have written why I am seeking this office, training I have received, and activities in preparation for being licensed. I have been regular in attendance at worship and in receiving the Holy Communion. I support the work of the church by regular giving.

(The following information required by Title III, Canon 3.)

Birthdate _____ Date and place of Baptism _____

Date and place of Confirmation _____

Signature of applicant _____

ENDORSEMENT BY PRIEST-IN-CHARGE:

I request that _____ be licensed as a _____ and I agree to supervise him/her in that office.

Date _____ Signed _____ Title _____

OR

ENDORSEMENT BY CONGREGATION:

At a meeting of the congregation, or of the Vestry or Church Committee, the application of _____ to become a licensed _____ in _____ Church was approved.

Date _____ Signed _____ Title _____

I want to be a licensed Lay Minister because:

LICENSED LAY MINISTRY APPLICATION—PAGE 2

I have received the following training:

My continuing education will include:

LICENSED LAY MINISTRIES RENEWAL APPLICATION—PAGE 1

For Lay Reader, Pastoral Leader, Lay Preacher, Lay Eucharistic Minister or Catechist. Please fill out a separate form for each ministry license for which you are applying. This form may also be used when renewing a license for Lay Missioner.

Dear Bishop:

In accordance with Title III Canon 3, Sec. 2b, I submit this Renewal Application for *(indicate one of the five ministries)*

_____. During the last three years I have:

1. Performed my ministry in the following ways: _____

2. Studied the following materials:

3. Attended continuing education sessions on: _____

Signed by Licensed Lay Minister

Date

Home Address of Lay Minister

City/State/Zip

Church Endorsement: I endorse the renewal of the license of _____ to serve in the above named lay ministry in _____ Episcopal Church.

Comments: _____

Signed: Sr. Warden, Priest or Deacon of the congregation

MARRIAGE IN THE CHURCH

1. The rubrics and additional directions in the Book of Common Prayer, and Canon I.17 and I.18 should be carefully followed.
2. The combination of the “Celebration and Blessing of a Marriage” with the Holy Eucharist is normative. Homily declaring the Christian understanding of Holy Matrimony is appropriate.
3. Premarital Counseling. Careful counseling before a wedding is required by Canon I.17. A minimum of 3 sessions (besides a rehearsal) is suggested as normative. If one party (or both) have been divorced, additional counseling may be needed. Group counseling, “Engaged Encounter”, and the services of a competent marriage counselor may be used to supplement this priest’s counseling, as it may appear helpful.
4. The priest should not agree to perform a wedding until after sufficient counseling has assured him that a Christian marriage is intended. He/She may decline to marry a couple at any point in the proceedings, for sufficient cause. The bishop’s counsel and advice may be sought, if desired.
5. The premarital “declaration” in Canon I.17, Sec.3(d) should always be carefully reviewed and signed by the parties before the wedding. A copy should be given them and the original filed with the church records. (See bottom of this page.)

DECLARATION OF INTENTION TO MARRY

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

Signed

Signed

MARRIAGE OF DIVORCED PERSONS

Generally, the canon provides for a pastoral approach to the request for marriage in the church following divorce, and the chief responsibility will be upon the parish priest to ascertain pastorally the following concerns:

1. Is the previous marriage really terminated legally, practically, and psychologically?
2. Has the divorced person learned what he/she contributed to the previous break-up so that he/she won't repeat in this marriage?
3. Have both parties to the proposed marriage accepted freely any continuing responsibilities from the previous marriage, such as child support?
4. What do they have going for them (and against them) in creating a good marriage now?
5. How can this be a growth experience for them both as persons, as a couple, as members of the church?

The canon does away with the whole matter of excommunication of a person who is remarried "otherwise than this church doth allow" in Canon 16. Now, one who goes counter to the church's marriage discipline is in the same position as one who goes counter to any other church discipline.

Thirty days' notice before a contemplated marriage is now required for **ALL** marriages. You may modify the thirty days for

substantial cause, but the bishop must be notified immediately thereafter of any such action and the reason for modification.

The one-year waiting period between final action of the divorce and remarriage has been dropped; and, on remarriage, the priest may now act for any couple so long as one is baptized. Membership "in good standing" is no longer required.

Generally, the priest is the one who bears the responsibility for decisions under Canon 18. It is required that the bishop take final action before any priest may officiate at the marriage of a person who has been divorced, but the pastoral responsibility is upon the local priest and he/she should share his/her thinking with the Bishop before final judgment. Remember that the required consultation with the bishop and the need for his consent strengthens your hand when it is necessary to deny an application.

WHAT TO PUT INTO LETTER TO BISHOP WHEN ONE PARTY, OR BOTH, IS DIVORCED:

1. Full identification of parties to proposed marriage:
 - a. Full legal names; b. Ages; c. Current address and phone numbers.
2. Pastor's assessment of the proposed marriage in the light of 1-5 in "Earlier Statement".
3. A description of the pre-marital counseling given.
4. The pastor's specific recommendation.

MARRIAGE AFTER DIVORCE APPLICATION—PAGE 1

The divorced partner to a proposed marriage fills out this form.

Please write your answers to the following questions as completely and carefully as possible. One copy will be kept by the pastor and the original statements will be forwarded to the bishop. Your statements will be helpful in determining permission for the pastor to celebrate your proposed marriage.

a. Full legal name _____ Birthdate _____ Baptized: yes _____ no _____

b. Full legal name _____ Birthdate _____ Baptized: yes _____ no _____

c. Current address and phone numbers:

Address _____ Phone: _____(H) _____(W)

Address _____ Phone: _____(H) _____(W)

d. Number of this marriage: Groom _____ Bride _____

Questions:

1. What was the cause/reason for your divorce? _____

MARRIAGE AFTER DIVORCE APPLICATION—PAGE 2

2. What do you understand that you contributed to the breakup of your previous marriage relationship(s) and how is that helpful to you in this new relationship of marriage that you intend?

3. The date your divorce was final: _____

4. In what ways have you terminated your previous marriage(s) emotionally and spiritually?

5. What continuing responsibilities do you have to your previous spouse and any children resulting from that marriage? Are these responsibilities accepted by you both freely and are you current in meeting those responsibilities? (Child support, child care, visitations, others?)

6. In terms of your proposed marriage what are the strengths in your new relationship?

What are the weaknesses?

MARRIAGE AFTER DIVORCE APPLICATION—PAGE 3

7. In terms of your proposed marriage, how do you see yourself growing as a person and as a couple?

8. What has been, is, and what do you intend in the future to be, your relationship to the church?

FOR CLERGY USE:

a. Pastor's assessment of the proposed marriage in the light of written answers to questions and counseling:

b. A description of the pre-marital counseling given:

c. The pastor's specific recommendation:

STEWARDSHIP

Financial giving is an important element of our spiritual relationship with God. According to Herb Miller, author of *Full Disclosure*, there are twenty financial stewardship themes that recur and evolve in the Old and New Testaments. *Full Disclosure* identifies these themes, lists their historical importance, and illustrates contemporary application for each theme. The themes fall into three categories: (1) Why should we give? (2) How does giving benefit us? And (3) How should we give?

Anyone looking for practical information and help in planning for preaching or teaching about financial giving will find this book useful. Four stars from Amazon.com: \$10.50. Try on these eight principles of Christian Stewardship, as adopted by the Missouri Synod Lutheran Church, and see what further thoughts and biblical support they excite in you! Christian Stewardship is the free and joyous activity of the child of God, and God's family, the church, in managing all of life and life's resources for God's purposes.

I. GOD'S STEWARDS ARE GOD'S STEWARDS.

God's stewards are stewards by virtue of creation and their re-creation in Holy Baptism; therefore, they belong to the Lord.

Is. 43:1 But now, this is what the Lord says—he who created you, O Jacob, he who formed you, O Israel: fear not, for I have redeemed you. I have summoned you by name; you are mine.

Rom. 6:4 We were therefore buried with him through baptism into death in order that, just as Christ was raised from the dead through the glory of the Father, we too may live a new life.

II. GOD'S STEWARDS ARE MANAGERS, NOT OWNERS.

God's stewards have been entrusted by God with life and life's resources and given the privilege of responsibly and joyfully managing them for Him.

Ps. 24:1 The earth is the LORD'S, and everything in it, the world, and all who live in it.

1 Chron. 29:14 But who am I, and who are my people, that we should be able to give as generously as this? Everything comes from you, and we have given you only what comes from your hand.

III. GOD'S STEWARDS ARE SAINTS AND SINNERS.

God's stewards rejoice in and live out what God has declared them to be through the cross. At the same time His stewards recognize they are sinners who fight sin and its consequences each day.

1 John 3:1-2 How great is the love the Father has lavished on us, that we should be called children of God! And that is what we are! The reason the world does not know us is that it did not know him. Dear friends, now we are children of God, and what we will be has not yet been made known. But we know that when he appears, we shall be like him, for we shall see him as he is.

IV. GOD'S STEWARDS ARE UNIQUELY SINGULAR, YET PROFOUNDLY PLURAL.

God's stewards recognize that their lives are not solo performances but are personal responses to God, lived out within the community of faith to benefit the whole world.

1 Pet. 4:10 Each one should use whatever gift he has received to serve others, faithfully administering God's grace in its various forms.

V. GOD'S STEWARDS ARE IN THE WORLD, BUT NOT OF THE WORLD.

God's stewards recognize that the Lord sets them apart from the world and by the transforming power of the Gospel sends them into the world to live out the Gospel.

John 16:33 I have told you these things, so that in me you may have peace. In this world you will have trouble. But take heart! I have overcome the world.

VI. GOD'S STEWARDS ARE LOVED AND LOVING.

God's stewards recognize that their stewardship flows out of God's act of love for them in Christ which empowers them, in turn, to love others in acts of Christ-like love.

Gal. 5:6b The only thing that matters is faith expressing itself through love.

VII. GOD'S STEWARDS ARE SERVED AND SERVING.

God's stewards recognize that their stewardship involves a Gospel-powered style of life which is demonstrated in servanthood within all the arenas of life.

John 13:15-17 I have set you an example that you should do as I have done for you. I tell you the truth, no servant is greater than his master, nor is a messenger greater than the one who sent him. Now that you know these things, you will be blessed if you do them.

VIII. GOD'S STEWARDS LIVE WITH AN AWARENESS OF THE PRESENT AND FUTURE, OF TIME AND ETERNITY.

God's stewards live intentionally in the light of God's eternal purpose while being firmly committed to His rule in the here and now.

Phil. 3:12-14,20 Not that I have already obtained all this, or have already been made perfect, but I press on to take hold of that for which Christ Jesus took hold of me. Brothers, I do not consider myself yet to have taken hold of it. But one thing I do: Forgetting what is behind and straining toward what is ahead, I press on toward the goal to win the prize for which God has called me heavenward in Christ Jesus. But our citizenship is in heaven. And we eagerly await a Savior from there, the Lord Jesus Christ.

2 Pet. 3:11-12a Since everything will be destroyed in this way, what kind of people ought you to be? You ought to live holy and godly lives as you look forward to the day of God and speed its coming.

A GUIDE TO GIFT PLANNING—PAGE 1

The following considerations of planned giving opportunities in no way constitute tax or legal advice by the diocese of Alaska. Please consult your attorney or tax preparer before making final arrangements for transfer of property, securities or cash.

What is a Planned Gift?

A planned gift is any gift made with the involvement of another person. For instance, a bequest is made through a Will and real estate is given through a Deed prepared by an attorney; a gift of stock is made with the help of a broker, mutual fund, transfer agent, etc. Gifts can be either deferred or current. This means you can give away the gift today, or later. A bequest is an example of a deferred gift and a gift of securities is an example of a current gift.

Why Should I Make a Planned Gift?

You can teach those you love about the importance of giving, how to give, and the place of the Church in your life.

You can give assets other than cash.

You can avoid paying capital gains taxes on your gift.

You can make a larger gift than you thought possible.

You can pass sizable assets to your children and grandchildren, free of estate and gift taxes.

The gift can pay you income for life and then to another person for life.

You can make a gift that does not cost you anything now and that can be revoked at any time.

You can be creative in making your gift by giving assets that you are not using or that are paying a yield less than 6%.

You can aid the specific ministries of the Church that interest you.

What Planned Giving Can Do For You

Pay you a stream of income for your life and/or the life of another.

Increase the income you may be receiving from an investment.

Provide a charitable income tax deduction.

Reduce or eliminate capital gains taxes or estate taxes.

Help your church and the diocese of Alaska

Enable you to leave a legacy for the next generation.

Can I See What the Gift Will Look Like?

YES. Through our partnership with The Episcopal Church Foundation, they can provide projections to you and your financial advisors using the best software available. Based on certain information you give them and certain economic assumptions, they can describe the expected financial consequences to you and your church, including tax deductions and income. Or you may take advantage of the on-line analysis instrument available at: www.ecf.giftplanning.org

If you wish personal assistance, contact our partners at The Episcopal Church Foundation at: 800-697-2858 or E-Mail to: Matt Freeman at matt@episcopalfoundation.org.

If you are uncertain of the gift you want analyzed, they will be happy to make a suggestion. The projection will tell you the amount of income you could receive, the tax deductions, the savings you receive compared with selling the asset, the expected gift to the church, and more.

What Assets Can I Use to Make a Planned Gift? *Cash or Check, Appreciated Securities, stock in Native Corporations, and "closely-held stock", Tangible Personal Property, Real Estate, Life Insurance, Whole or Term, Retirement Funds and Assets*

A Check or Cash: Cash or a check is always an acceptable gift to your church or diocese. We will return a receipt for your gift. You will need it to receive a tax deduction. Always make the check payable to the church or diocese, never an individual. Bank accounts can also be made payable upon death (POD) to your church or diocese. This will make them pass directly to your choice upon your death.

Appreciated Securities: Gifts made with appreciated publicly traded securities such as stocks, mutual funds, and bonds provide attractive benefits. Making a gift of securities held for more than a year can eliminate capital gains taxes and, in most cases, the donor obtains a charitable income tax deduction equal to the market value of the securities. Appreciated securities that are not paying a competitive dividend or are not appreciating significantly might be especially advantageous to you as a gift to your church or diocesan ministries. Using appreciated securities at year-end is even more beneficial.

An owner of closely held stock may give the stock to their church or diocese and receive important financial benefits. A very attractive feature of this gift is the practice of a company repurchasing the stock from the Church, which allows it to retain the company's private control and who instead transfers cash to your chosen recipient.

Gifts can be made outright or through one of the charitable gift arrangements discussed here. The transfer of stock is easy. You can have the stock transferred to a brokerage account opened for the church or diocese at your broker, or to the church or diocese's existing brokerage account, or by the transfer agent. Remember: the gift doesn't legally occur until the church or diocese owns the stock. The means to do this are included elsewhere on this document, entitled Transfer of Stock.

Real Estate: Real estate includes vacant land, homes, condominiums, commercial property, rental property, and others. If the property has been owned for at least a year and appreciated significantly, a gift of real estate will eliminate capital gains taxes and broker's commissions if the property were sold. The gift also gives the donor a chance to change investments.

If you are thinking of giving real estate, do not sell it yourself. If you do, you will have to pay any taxes owed on the appreciation. If it is sold by the Church (even if you find the buyer), you can receive a charitable deduction for the entire value without paying any capital gains taxes you might otherwise owe.

Donors can make an outright gift or they may retain some interest in the property, such as the right to live in it for the rest of their lives. You can also place the property in a trust. You can give a fractional interest in the property. Real property may also be given to the church through your Will. The property must be unencumbered, that is, no money may be owed on the property when it is transferred to the Church; and an inspection of the property may be required by the parish or diocese before accepting or refusing the gift.

Life Insurance policies: All insurance policies allow you to name one or more primary, secondary, and contingent beneficiaries. You can give some or all of the proceeds from an insurance policy to a Church by naming the church or diocese as one of the primary, secondary, or contingent beneficiaries. Naming the church or diocese as a contingent beneficiary means they receive all or part of the proceeds if none of the other beneficiaries survive you.

There are basically two types of life insurance: Term and Whole Life. Term insurance is commonly called pure insurance because the premium is only to insure your life for a term of one year. Whole life is insurance coupled with an investment. Once you have paid your

A GUIDE TO GIFT PLANNING-PAGE 2

premium in full, you can surrender the policy and receive the cash value.

Retirement Funds (401(k); 403(b); IRAs, Keogh, SEP, Qualified Plans): All retirement funds allow you to name one or more primary, secondary, and contingent beneficiaries. You can include the church or diocese among the named beneficiaries of your retirement plan(s). Retirement funds can be among the best assets to use for a charitable gift. The reason involves the fact that they grow without paying income taxes. If you give them to an individual upon your death, income taxes and estate taxes may dramatically reduce the funds. Your loved ones may only receive a fraction of their present value. Check your situation with your accountant.

However, any gifts of retirement funds to a church or diocese are made free of any income or estate tax because the gift to the Church receives a charitable deduction. You can also make this gift without going to a lawyer or incurring any fee or charge. Check with your accountant or human resources department at your employment.

These funds are also passed by naming a beneficiary. If none is named or all are deceased, the assets become part of your estate and pass according to the Will or laws of intestacy if there is no Will. Retirement funds can be among the most valuable assets you own. They accumulate tax free and thereby grow much faster than taxable assets.

Tangible Personal Property: Tangible personal property is anything you can touch, except real estate. Also, it does not include money or securities of any kind. They are intangible. In order for the owner to take advantage of the largest tax deduction, the charity must use the property for a related use. This means the church uses the gift for a purpose related to its charitable purpose. If the gift is so related, the donor may deduct the full appraised value of the gift. Otherwise, the donor can only deduct his/her original cost of the gift. Tangible personal property can be delivered to a charity during the donor's lifetime, or it can be given to the charity through the donor's Will.

What Are Some Examples of Planned Gifts?

Gifts made through your Last Will and Testament: A gift through your will (a bequest) can provide significant support to the Church. It also provides the following benefits: (a) the opportunity to make a major gift while preserving assets during life; (b) reduction in federal estate taxes; (c) the opportunity to designate the gift to a specific program at your Church or ministries and endowments of the diocese. Remember, your will only passes probate assets. It does not transfer assets that designate a beneficiary, such as life insurance. Arrangements to make a gift of these assets are included elsewhere in this document.

A gift through your will can be made in the following ways:

Specific Bequest: Your church or the diocese receives a specific dollar amount, a specific piece of property, or a stated percentage of the estate. This is one of the most popular forms of bequests.

Residuary Bequest: The church or diocese will receive all or a stated percentage of an estate after distribution of specific bequests and payment of debts, taxes, and expenses.

Contingent Bequest: The Church or diocese will receive part or all of the estate under certain specified circumstances.

Trust Established Under a Will: A trust may be established that provides for both the Church and other beneficiaries, such as the diocese of Alaska.

Life Income Gifts: A donor may make a gift to the Church and receive direct financial benefits. The benefits include an income for life to the donor and/or the donor's spouse and a charitable income tax deduction, in addition to the good feeling that comes from making a gift. There are several forms of the gifts. They can provide you with an immediate income of a variable or fixed rate, or you may want a gift that will give you a fixed rate of return some time in the future. This last form is especially useful in retirement planning. In determining which life income gift is most appropriate, the following questions should be answered:

- What is the age of the donor and/or the donor's spouse?
- Will the gift be based on one or two beneficiaries?
- Will the gift be funded with cash, appreciated securities, or real estate?

Benefits of Life Income Gifts:

- Income paid to the donor for lifetime and/or spouse's lifetime
- A charitable income tax deduction
- Possible avoidance of capital gains taxes on appreciated property
- A higher yield than from current investments
- A reduction in federal estate taxes

Charitable Remainder Trust: A charitable remainder trust provides a donor with a lifetime income and a charitable income tax deduction. The donor selects the payout rate, usually between 5% and 7%. The higher the payout rate, the lower the charitable income tax deduction. This gives the donor, and perhaps the donor's spouse, an income every year for life. If the donor funds the trust with appreciated securities, the donor will avoid capital gains taxes.

Donors may choose from two types of charitable remainder trusts: the annuity trust and the unitrust. The annuity trust pays a fixed, guaranteed dollar amount regardless of the trust's investment performance. The unitrust pays the donor a predetermined percentage of the fair market value of the trust's assets as revalued annually.

Benefits:

- Avoid capital gains taxes on the transfer of appreciated property.
- Increase dividends ranging from 2% to 4% to dividends as much as 6% or more.
- Obtain a charitable income tax deduction.
- Provide income to one or two beneficiaries for life
- Establish or contribute to an endowed fund at your church or diocese.

Charitable Lead Trusts: A lead trust is the opposite of a charitable remainder trust. The "lead" income is paid first to your Church, and after a number of years (based on a term or a lifetime) the remainder is returned either to the grantor (a grantor lead trust) or to someone other than the grantor, such as the grantor's beneficiaries (a non-grantor lead trust). It is an extremely tax efficient way of passing assets to future generations while, at the same time, making a large donation to the church. The church is given a stream of dependable annual income to carry out its mission. The donor may be able to pass the asset to heirs at a very low tax cost.

Benefits:

- Philanthropic satisfaction
- Principal returns to donor
- Tax deduction taken in the year of the gift
- Church receives outright gift for term of trust
- Church can plan for longer range ministry

A GUIDE TO GIFT PLANNING-PAGE 3

WILLS AWARENESS-PAGE 1

Life Insurance: The need for insurance coverage usually lessens as we age. By then, insurance has served its original purpose of protecting our families and it can now be used for other purposes.

There are two types of insurance: Term insurance protects us for a stated term, usually one year. Whole life buys the policyholder a death benefit and will also pay the holder the cash value of the policy if he/she terminates the policy before death.

A life insurance policy can be given as an outright gift. The donor gives up all rights of ownership in the policy and thereby receives an income tax deduction.

A donor can also name a charity as a total or partial beneficiary of the policy, continue to maintain the policy, and receive charitable tax deduction for premiums he or she makes to keep the policy in force. You have to change the beneficiary form.

In making a gift of life insurance, you may:

- Make a gift of an existing life insurance policy.
- Establish a new policy and name your Church as the owner of the policy.
- Use life insurance to replace the value of gifts to the Church.
- Change your beneficiary to give a proportion to the church.

Retirement Plans: These plans include IRAs, Section 401(k) and 403(b) Plans, Qualified Pension Plans, and Qualified Profit-Sharing Plans. You can transfer all or part of these assets to a charity. These options include an outright gift, designation of a beneficiary, bequest, and transfer to a charitable remainder trust.

Designation of beneficiary: A donor can designate a charity or church to receive all or a stated percentage of a retirement account upon death. The donor receives an estate tax charitable deduction. Please note: As regards some retirement plans, your spouse must also sign a statement agreeing to include the church as a beneficiary.

Bequest: In the absence of a beneficiary designation, you can transfer your retirement accounts upon your death through your will. A bequest of a retirement account should be specifically to a parish or diocesan ministry to avoid income taxation of the funds.

Trust: If the plan permits, a donor may transfer the account to a charitable remainder trust. The plan donor will be taxed only on the funds received by him/her. At death, the balance will be paid to a charitable remainder trust, which can pay income to one or more beneficiaries for life, with the remainder going to the charity or ministry of your choice upon the death of the last beneficiary.

“From Generation to Generation”

As Episcopalians we are asked to examine our priorities and find a way to give from the extraordinary gifts which our Lord has blessed us. One way to do that is to remember your congregation, or any diocesan or national church program or ministry with a planned gift. The simplest way to provide a permanent source of support for your Episcopal Church is through a bequest in your will.

On page 445 of the Book of Common Prayer the rubric reminds us “The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families...not neglecting, if they are able, to leave bequests for religious and charitable uses.” Nearly 50% of Americans die without a written will. In that case the state will make decisions for your family which they must then follow. You cannot provide for minors. The court will appoint a guardian for them, and the guardian will make decisions about the child’s care which you might not have made.

For purposes of inheritance, Alaska is not absolutely a “community property” state. If you are married, most of what you have you own jointly with your spouse. But not necessarily everything. At the death of a spouse who does not have a will, the survivor will normally receive the community property of the deceased, but not necessarily all of the separate property.

When the survivor - or any unmarried person - is called to his or her reward without a will, the Probate Court of the State of Alaska will decide what is to be done with the assets in accordance with the laws of the state. What difference does it make? Won’t the court give your assets to your next of kin? Probably, but not to your special friend, not to your church or your school or other favorite charities. In the absence of a will that expresses your wishes clearly and legally, the court will decide according to a formula; it will not consider the special needs of any of your family members.

You can only be certain that your wishes will be carried out as you intend if you make a will and update it every few years or every time your situation changes significantly, such as when: moving to another state, your children mature, your marital status changes, a family member is born or dies, you retire, etc.

Making a will is your opportunity to express in legal terms your priorities and concerns for the people and institutions in your life. The rubric from the Book of Common Prayer reminds readers “. . .to leave bequests for religious and charitable uses.” This offers you a threefold opportunity: to support your church, to be a part of the life of the church community after you have left this life, and to make a witness to your family and friends of what was important and valuable in your life.

The Development Office of the Diocese of Alaska is eager to help individuals and congregations to further develop their financial discipleship. Including:

- * Wills/estate planning seminars
- * Individual consultation from a professional gift planning specialist through our partnership with the Episcopal Church Foundation

WILLS AWARENESS-PAGE 2

- * Model language to include the Church in your will
- * Preaching & spiritual guidance on the theology of stewardship and planned giving—financial discipleship, or a God-centered relationship to money
- * Help with establishing an endowment fund for local congregations or other diocesan ministries
- * Referral to attorneys or professional gift planners to assist individuals

Why does everyone need a will?

With a Will:

You can direct the distribution of your assets to those you care about most.

You can choose a personal representative (executor) who will oversee the distribution of your assets.

You avoid unnecessary expenses on the administration of the estate.

You can provide appropriately for minor children by naming a guardian or establishing a trust.

You can provide for family members, friends, or relatives according to their needs.

You can save considerable estate tax by utilizing proper estate planning techniques.

You can provide support for charitable causes that have had special meaning for you.

You can give a last and lasting testimony of what mattered most to you in this life, and provide a compass for others to steer by in their own.

Without a Will:

State statute determines the distribution of your property.

The court appoints an administrator for you.

Because the administrator is subject to constant court supervision, the cost of administering the estate may be greater.

You cannot provide for minors. The court will appoint a guardian for them, and the guardian will make decisions about a child's care which you should have made.

Your heirs will not necessarily benefit in proportions or amounts you would have intended.

Your estate may lose thousands of dollars in needless taxes because you did not take advantage of the tax-saving opportunities available to you.

You cannot support a charitable cause.

Where to Give?

You may wish to give to a specific ministry within the diocese of Alaska, or you may wish to make an unrestricted gift. You may wish also to increase the endowments of our diocese. To help in your decision, some particulars of these ministries are below:

The Alaska Endowment provides additional funds to our annual operating budget, without restriction of ministries within that budget.

The Rt. Rev. Mark MacDonald Major Gifts Campaign provides to "The Hudson Stuck Fund for Mission Travel" and "Keeping Jesus as the Light in the Wilderness", "The Case for Father David Salmon School of Ministry".

Faith Into Tomorrow Endowment provides grant monies in areas of evangelism, congregational development, leadership training, and social services/outreach.

Bishop's Discretionary Endowment provides earnings for bishop's discretionary use.

Bishop's Discretionary Fund provides immediate money for bishop's discretionary use.

Bishop's Travel Fund provides for support of bishop's travel.

David Salmon School of Ministry provides for lay and clergy opportunities in pastoral, educational and practical skills development.

John Starr Youth Development Fund provides increased support of youth-centered parish based programs, such as Sunday School materials and teacher training.

Norm Elliott Scholarship Fund provides increased support for ministry development.

Native Evangelism Support Team provides support, primarily travel costs, for Episcopal Alaska Native evangelists in their work throughout Alaska.

Special Needs Fund provides one-time support of parish ministry opportunities.

Prison Ministries Fund provides support of ministry to Alaskan and Arizona prisons, especially in outreach to Alaska Natives incarcerated out-of-state.

Education for Ministry (EFM) provides a four-year seminary based, mentor-led survey course of Bible, Theology, Church History, and Liturgy (worship).

HOW TO MAKE A GIFT OF STOCK

INFORMATION ON STOCK TRANSFERS TO THE DIOCESE OF ALASKA, ITS MEMBER CONGREGATIONS, AND OTHER EPISCOPAL MINISTRIES

Securities may be the best asset for you to give to support programs of the Diocese or your congregation or other Episcopal ministries, in light of certain tax advantages. If you give appreciated securities that you have held for at least one year and a day, you can deduct the full fair market value (both the amount you paid and your gain), up to 30% of your adjusted gross income in the year of the gift. Any excess may be deducted over the next five years. By giving securities to the Church you avoid paying capital gains tax as well as ordinary income tax. If the gift is valued at more than \$500, you will need to fill out IRS Form 8283 and submit it to the Diocese.

The Diocese will acknowledge receipt of the gift on this form and return it to you so that you may comply with all IRS regulations.

How to Make the Stock Transfer—A letter of instruction (see sample letter on next page) should be sent to three places:

1. Your broker
2. Diocese of Alaska brokerage firm (UBS Financial Services Inc., see address below)
3. Diocesan Planned Giving Office, 1205 Denali Way, Fairbanks Alaska 99701

The letter should indicate the church, diocesan program or purpose you wish to support. Electronic transfers are the most efficient method. However, if you have the stock certificates in your possession, you should send the unendorsed stock certificates and a signed stock power (available from your broker) in separate envelopes to our broker.

If your broker holds the security for your account, instruct the broker to transfer the securities electronically to **the Episcopal Diocese of Alaska, UBS account UC-17656, DTC #0221**. If there are questions, have your broker contact the diocesan brokerage firm at UBS for specific details.

* Account Name & Number: Episcopal Diocese of Alaska, UBS #UC-17656

* Tax ID Number 13-5562208

* DTC: #0221

- Broker for the Diocese: Michael Meek, Kelly McPherran
UBS Financial Services Inc.
3000 A Street, Suite 100
Anchorage, AK 99503-4087
(206) 261-5974, (206) 261-5966

- Purpose of gift: Include specific instructions regarding the congregation, program, and purpose of your gift. Be aware that electronic transfers can take a week or more and certificates can take a month or more.

How is the Value of Securities Established?

For income tax purposes, the value of a gift is the median market value on the day the gift is made. If a security is listed on a recognized stock exchange, the median market value represents the mid-point between the high and the low of the listed stock on the day the gift is made. The date the gift is made is determined by any of the following:

- When it has been hand delivered to the parish or diocese
- When received by the broker or agent for the parish or diocese (not the donor's)
- The date the securities are mailed to the parish or diocese or its broker or other agent
- When delivered to the parish or diocese by the donor's broker or agent
- When transferred to the parish or diocese on the books of the corporation if the donor delivers stock certificate to his/her bank or broker as the donor's agent, or to the issuing corporation or its agent, for transfer into the name of the parish or diocese

Always check with your own tax adviser when you contemplate a major gift of stock.

Thank you for your gift of stock to support the Episcopal Church. For more information about including your parish or the diocese in your will or estate plans, contact the Planned Giving Office at (907) 452-3040.

“Glory to God whose power, working in us, can do infinitely more than we can ask or imagine: Glory to him from generation to generation in the Church, and in Christ Jesus for ever and ever.”
Ephesians 3:20,21

HOW TO MAKE A GIFT OF STOCK—SAMPLE LETTER

Mail a copy to the Diocesan offices, to your broker, and to the Diocesan broker.

Your Return Address
Your Phone Number

Date

Inside address (to your broker)

Dear _____:

Please transfer (number) shares of (Name of company, common or preferred) stock (“ticker” symbol _____) from my account (brokerage or custodial account #_____) to the Episcopal Diocese of Alaska account # UC17656 , Distribution Account, DTC #0221, at UBS Financial Services, Inc.

The Tax ID number of the Diocese is 13-5562208, and its address is:

Diocese of Alaska
1205 Denali Way
Fairbanks, AK. 99701
(907) 452-3040

This gift is for the benefit of (congregation or diocese or program) in (city and state) for the following purpose (s):

Sincerely,

(Signature in full)

Type your Name

Cc: Diocese of Alaska, Planned Giving Office, 1205 Denali Way Fairbanks, AK. 99701

INSTRUCTION TO COMMITTEES OF DIOCESAN CONVENTION

Committee on Dispatch of Business - to consult with the Chairman of the convention, the Secretary, and various committee heads, and to establish the order of business for each business session.

Committee on Resolutions - to receive resolutions referred by the chair, to review same and to confer with authors of resolutions in case the committee suggests changes, and to report to Convention in one of the following alternative forms:

- A. Recommends adoption, with or without amendments. The question will be on the adoption of the resolution or the resolution as amended;
- B. Recommends rejection, with or without reasons. The questions shall be on the adoption of the resolution;
- C. Makes no recommendation. The question shall be on the adoption of the resolution;
- D. Recommends that it be discharged from further consideration of the resolution because:
 - 1. The matter is not within the scope of the committee's function, in which case it may recommend referral to an other committee.
 - 2. The matter has already been dealt with by the action of the Convention; or
 - 3. For other reasons.

Committee on Courtesy Resolutions - to prepare appropriate resolutions of courtesy and appreciate and present them to the convention at the last business session. After the Convention, the committee is responsible for conveying in written form the convention's resolutions for courtesy, appreciation, condolences, greetings, etc., to the appropriate parties.

Committee on Budget Review:

- A. To receive the budget as presented by the Standing Committee;
- B. Study it carefully;
- C. To hold a budget hearing at a time set by the Convention agenda;
- D. To present the budget to the convention for its action with any revision, if they are deemed advisable.

Committee on Constitution and Canons - to review and recommend any matters involving changes to the Consitution and/or Canons.

Committee on Nominations and Elections:

- A. To present nominations for all vacant offices, securing the consent of each person so nominated beforehand;
- B. To recommend and use procedures for voting;
- C. C. To report the results of all elections promptly.

Committee on Prayer - shall be responsible for being avialable for private, intercessory or pastoral prayer by members of the Convention and, during assigned committee meeting times, shall meet together to pray for the convention, its business, and concerns.

Committee on Next Convention - shall be responsible for arranging the location of the next year's convention.

EPISCOPAL DIOCESE OF ALASKA—MINISTRY REPORT FORM

Thank you and God bless you for the ministry that you provide to the Episcopal Diocese of Alaska. To better understand this ministry; please share with the Diocesan Convention the following information, to be included in delegate packets and Convention Journal.

Date: _____

Name: _____

Committee/Deanery/Ministry: _____

1. Please highlight the activities/events and/or projects of your ministry/committee since last year's convention.

2. Tell us about the goals of your ministry for next year:

3. Stewardship.	Do you receive support from the Diocese?	Yes_	No_
	If Yes, are you within budget?	Yes_	No_
	Are you raising additional funds?	Yes_	No_
	Please explain your overall financial situation:		

4. Please share any other comments or concerns that you have regarding your ministry.

If you need more space please feel free to use additional pages.

SOCIETY OF ST. SIMEON AND ST. ANNA NOMINATION FORM

Purpose: To honor those individuals who have worked in the church at least 15 years.

Responsibilities: 1) To pray daily for the Diocese and its people. 2) Advise the bishop on matters concerning the church.
3) Provide a living example of the Christian life.

Membership: Is limited to those persons who are 60 years of age or older, and who have worked in the Episcopal Church in Alaska for at least 15 years.

This portion of the nomination form should be completed by the person being nominated and the person doing the nominating. It should be signed by the nominee, and the Priest, or Senior Warden of the church, and sent to the local Dean of the Deanery. If you have questions, please phone the Diocese at 1-800-478-3043 .

Nominee’s Name: _____

Address _____

Telephone _____ Birth Date _____

Church membership with _____ Episcopal Church.

List below some of the ministries you have been involved in over the last 15 years. Use the reverse side of this page for additional information.

I understand the purpose and responsibilities of the Society of St. Simeon and St. Anna, and do agree to serve as a member.

Signed by nominee

Date

Signature of Priest, or Chair of Church Committee of nominee

Date

Signature of Dean if this person is chosen by the Deanery

Date



Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, AK 99701-4137

Safe Church Program
Phone (907) 452-3040
Fax (907) 456-6552

BACKGROUND CHECK INFORMATION AND
STATEMENT OF RELEASE & AGREEMENT

Definition of Sexual Misconduct

Sexual misconduct is defined by the Diocese of Alaska as any

- a) **sexual abuse or sexual molestation** of any person, including but not limited to, any sexual involvement or sexual contact with a person who is a minor or who is legally incompetent; or
- b) **sexual harassment** in a situation where there is an employment, mentor or colleague relationship between the person involved, including but not limited to: sexually-oriented humor or language; questions or comments about sexual behavior or preference unrelated to employment qualifications; sexualized physical contact; inappropriate comments about clothing or physical appearance; repeated requests for social engagements or
- c) **sexual exploitation**, including but not limited to, the development of or the attempt to develop a sexual relationship between clergy person, employee or volunteer and a person with whom he / she has a pastoral relationship, whether or not there is apparent consent from the individual. It is the policy of the Diocese of Alaska that sexual abuse, exploitation or harassment of any kind by anyone who undertakes ministry, whether staff person or volunteer of this diocese or any of its congregations or agencies, will not be tolerated.

General Information

Name: _____
First Middle Last

Congregation/Position: _____

Social Security #: _____ Date of Birth: _____ Male Female

Driver's License Number: _____ State: _____

Home Phone #: _____ Work Phone #: _____ Email: _____

Current Address: _____
City State Zip

Previous Address: _____
City State Zip

(over)

Education

School, College, or University: _____

Dates Attended: _____ Degree: _____

Graduate School: _____

Dates Attended: _____ Degree: _____

Professional License (Please list any professional licenses you hold): _____

Employment

Present Employer: _____ Hire Date: _____

Street or P.O. Box: _____

City *State* *Zip*

Current Position: _____ Supervisor's Name: _____

Previous Employers (Last five years, please list name, address, dates.):

Statement of Release and Agreement

I, _____ hereby give my permission for the Episcopal
Name (Please print)

Diocese of Alaska to conduct background checks on me as necessary for my service or employment as

_____ at _____
Position *Name of church or organization and location*

I understand that the information requested is to be mailed directly to and will be held in confidence by the Diocesan office, at 1205 Denali Way, Fairbanks, AK 99701

I have read, understood and agree to abide by the policies and procedures concerning the issues of sexual abuse, harassment and exploitation. I specifically release the Diocese, its agents and employees from liability in carrying out these policies, including, without limitation, any liability for the disclosure in good faith of any information relating to sexual misconduct relating to me, whether or not the information is correct. This release applies only to information given or publicized in good faith in the course of an official Diocesan proceeding. I affirm and dedicate myself to the highest ethical conduct and behavior in my service within the Diocese.

Signature Date _____



Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, AK 99701-4137

Safe Church Program
Phone (907) 452-3040
Fax (907) 456-6552

COUNSELING, PASTORAL CARE, & SPIRITUAL DIRECTION AGREEMENT

Agreement

I, _____ have read, understand, and agree to abide by the policy of the Diocese of Alaska which states:

"... all clergy and other pastoral care providers (cleric, employee or volunteer who provide counseling, pastoral care, spiritual direction or spiritual guidance, or confession) are required to have ongoing professional supervision or to refer an individual to professional counseling after six sessions have been held, and fees or donations for passtoral care will be proscribed. Anyone charging fees for counseling outside the scope of church employment must possess appropriate professional credentials and proof of separate professional liability insurance, including coverage for sexual misconduct, in force at all times."

Signed _____ Title/Position _____

Dated _____ Church/Agency _____

Treatment Exceeding Six Sessions

For any counseling, pastoral care, spiritual direction, or spiritual guidance *exceeding six sessions* I have an agreement and *meet at least once a month* with the professional/clinical supervisor(s), below. I understand that I am responsible for notifying the Diocese of changes as they occur concerning the following:

Signature of Supervisor	Profession/Discipline	License/Certification	Hours/Month

Professional Credentials

For any counseling, pastoral care, spiritual direction or spiritual guidance provided outside the scope of church employment/ sponsorship, I hold the following professional credentials:

Profession/Discipline	Highest Academic Degree	Academic Institution	License/Certification

Please send to the Diocesan Office at the above address copies of:

- your highest academic degree achieved applicable to your professional practice,
- all appropriate state licenses,
- all professional certifications, and
- request your insurance carrier to send to the Episcopal Diocese of Alaska a Certificate of Insurance for your individual liability insurance showing coverage for sexual misconduct .

bglay 01/02



Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, AK 99701-4137

Safe Church Program
Phone (907) 452-3040
Fax (907) 456-6552

INFORMATION RELEASE #1

I, _____ hereby give my permission for the
Name of Applicant (clergy, employee, or volunteer)

release of information requested below by the Episcopal Diocese of Alaska as necessary for my employment or volunteer activity within the Diocese, one of its congregations, or agencies. I understand that this information will be held in confidence in the Diocesan office.

Signature *Date*

Request for Information - Employer

(Applicant, please make copies of this form, then fill out one for each employer you have had during the past five years. If you have been involved with only one job during that time, please complete and send form to each of your previous two employers.)

Employer: _____

Address: _____

from _____ to _____

Dear Receiving Employer:

Please read the Diocese of Alaska's Definition of Sexual Misconduct on the reverse of this form, then answer the following questions to the best of your ability / knowledge, sign, and return to: The Episcopal Diocese of Alaska, Attn: Safe Church Program, 1205 Denali Way, Fairbanks, AK 99701-4137.

1. Do you know or have reason to know that the above person has ever engaged in sexual misconduct as defined by the Diocese of Alaska? Please Circle: No Yes

2. If yes, please provide what information you have regarding the possibility that the above person has engaged in sexual misconduct as defined by the Diocese of Alaska.

Signature *Date*

Title *Organization*

DIOCESE OF ALASKA—DEFINITION OF SEXUAL MISCONDUCT

Sexual misconduct is defined by the Diocese of Alaska as any

- a) **sexual abuse or sexual molestation** of any person, including but not limited to, any sexual involvement or sexual contact with a person who is a minor or who is legally incompetent; or
- b) **sexual harassment** in a situation where there is an employment, mentor or colleague relationship between the person involved, including but not limited to: sexually-oriented humor or language; questions or comments about sexual behavior or preference unrelated to employment qualifications; sexualized physical contact; inappropriate comments about clothing or physical appearance; repeated requests for social engagements or
- c) **sexual exploitation**, including but not limited to, the development of or the attempt to develop a sexual relationship between clergy person, employee or volunteer and a person with whom he / she has a pastoral relationship, whether or not there is apparent consent from the individual. It is the policy of the Diocese of Alaska that sexual abuse, exploitation or harassment of any kind by anyone who undertakes ministry, whether staff person or volunteer of this diocese or any of its congregations or agencies, will not be tolerated.



Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, AK 99701-4137

Safe Church Program
Phone (907) 452-3040
Fax (907) 456-6552

INFORMATION RELEASE #2

I, _____ hereby give my permission for the
Name of Applicant (clergy, employee, or volunteer)

release of information requested below by the Episcopal Diocese of Alaska as necessary for my employment or volunteer activity within the Diocese, one of its congregations, or agencies. I understand that this information will be held in confidence in the Diocesan office.

Signature

Date

Request for Information - Diocesan

(Applicant, please make copies of this form, then fill out one for each diocese you have been part of during the past five years. If you have been involved with only one diocese during that time, please complete and send form to each of the previous two dioceses with whom you have related.)

Diocese of Canonical Residence: _____

under canonical authority of diocesan bishop Rt. Rev. _____

from _____ to _____

Dear Receiving Diocesan Bishop:

Please read the Diocese of Alaska's Definition of Sexual Misconduct on the reverse of this form, then answer the following questions to the best of your ability / knowledge, sign, and return to: The Episcopal Diocese of Alaska, Attn: Safe Church Program, 1205 Denali Way, Fairbanks, AK 99701-4137.

1. Do you know or have reason to know that the above person has ever engaged in sexual misconduct as defined by the Diocese of Alaska? Please Circle: No Yes
2. If yes, please provide what information you have regarding the possibility that the above person has engaged in sexual misconduct as defined by the Diocese of Alaska.

Signature

Date

Title

Organization

DIOCESE OF ALASKA—DEFINITION OF SEXUAL MISCONDUCT

Sexual misconduct is defined by the Diocese of Alaska as any

- a) **sexual abuse or sexual molestation** of any person, including but not limited to, any sexual involvement or sexual contact with a person who is a minor or who is legally incompetent; or
- b) **sexual harassment** in a situation where there is an employment, mentor or colleague relationship between the person involved, including but not limited to: sexually-oriented humor or language; questions or comments about sexual behavior or preference unrelated to employment qualifications; sexualized physical contact; inappropriate comments about clothing or physical appearance; repeated requests for social engagements or
- c) **sexual exploitation**, including but not limited to, the development of or the attempt to develop a sexual relationship between clergy person, employee or volunteer and a person with whom he / she has a pastoral relationship, whether or not there is apparent consent from the individual. It is the policy of the Diocese of Alaska that sexual abuse, exploitation or harassment of any kind by anyone who undertakes ministry, whether staff person or volunteer of this diocese or any of its congregations or agencies, will not be tolerated.



Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, AK 99701-4137

Safe Church Program
Phone (907) 452-3040
Fax (907) 456-6552

INFORMATION RELEASE #3

I, _____ hereby give my permission for the
Name of Applicant (clergy, employee, or volunteer)

release of information requested below by the Episcopal Diocese of Alaska as necessary for my employment or volunteer activity within the Diocese, one of its congregations, or agencies. I understand that this information will be held in confidence in the Diocesan office.

Signature *Date*

Request for Information - Educational Institution

(Applicant, please make copies of this form, then fill out one for each educational institution you have attended during the past five years. If you have been involved with only one school during that time, please complete and send form to each of the previous two schools.)

Educational Institution: _____

Address: _____

from _____ to _____

Dear Receiving Educational Institution:

Please read the Diocese of Alaska's Definition of Sexual Misconduct on the reverse of this form, then answer the following questions to the best of your ability / knowledge, sign, and return to: The Episcopal Diocese of Alaska, Attn: Safe Church Program, 1205 Denali Way, Fairbanks, AK 99701-4137.

1. Do you know or have reason to know that the above person has ever engaged in sexual misconduct as defined by the Diocese of Alaska? Please Circle: No Yes
2. If yes, please provide what information you have regarding the possibility that the above person has engaged in sexual misconduct as defined by the Diocese of Alaska.

Signature

Date

Title

Organization

DIOCESE OF ALASKA—DEFINITION OF SEXUAL MISCONDUCT

Sexual misconduct is defined by the Diocese of Alaska as any

- a) **sexual abuse or sexual molestation** of any person, including but not limited to, any sexual involvement or sexual contact with a person who is a minor or who is legally incompetent; or
- b) **sexual harassment** in a situation where there is an employment, mentor or colleague relationship between the person involved, including but not limited to: sexually-oriented humor or language; questions or comments about sexual behavior or preference unrelated to employment qualifications; sexualized physical contact; inappropriate comments about clothing or physical appearance; repeated requests for social engagements or
- c) **sexual exploitation**, including but not limited to, the development of or the attempt to develop a sexual relationship between clergy person, employee or volunteer and a person with whom he / she has a pastoral relationship, whether or not there is apparent consent from the individual. It is the policy of the Diocese of Alaska that sexual abuse, exploitation or harassment of any kind by anyone who undertakes ministry, whether staff person or volunteer of this diocese or any of its congregations or agencies, will not be tolerated.



Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, AK 99701-4137

Safe Church Program
Phone (907) 452-3040
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SAFE CHURCH TRAINING SURVEY

The Episcopal Diocese of Alaska is revising our Safe Church Training on sexual misconduct. Even if you have received training through another diocese or your workplace, you must complete the diocesan training. Please check all below which apply to you, to assist us in arranging training locations and dates for future sessions. If you have a certificate, please attach a copy.

Name: _____

Date: _____

Congregation: _____

Location: _____

Diocesan Training

I have already taken the Diocese of Alaska Safe Church Training:

Location _____ Date _____

I have taken similar training on safe church issues in another diocese:

Diocese _____ Date _____

Employment Training

I have taken training on sexual misconduct (sexual harassment, sexual exploitation, sexual child abuse) through my employment:

Workplace _____ Date _____

Other Training

I have taken training on sexual misconduct (sexual harassment, sexual exploitation, sexual child abuse) in the following manner:

Situation _____ Date _____



Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, AK 99701-4137

Safe Church Program
Phone (907) 452-3040
Fax (907) 456-6552

SAFE CHURCH PERSONAL REFERENCE QUESTIONNAIRE

(Applicant, please copy and give this form to two personal references, to be filled out and mailed by them in an envelope marked "CONFIDENTIAL" to: Safe Church Program, Episcopal Diocese of Alaska, 1205 Denali Way, Fairbanks, AK 99701.)

I, _____ hereby give my permission for the
Print name of Applicant (clergy, employee, or volunteer)

release of information requested below by the Episcopal Diocese of Alaska as necessary for my employment or volunteering as a _____ within the Diocese, one of its congregations, or agencies. I understand the information will be held in confidence in the Diocesan office.

Signature _____ Date _____

Request for Information (from a non-relative)

Please answer the following questions (use the other side for longer answers or further comments).

I have known (applicant) _____ for (length of time) _____
as a (friend, co-worker, baby-sitter, employer, etc.) _____

- 1) What qualities and skills does this person have to do well in this position?
- 2) What can you say about this person's religious experience, the maturity of his/her spiritual development, and areas for spiritual growth?

3) Do you believe this person can work successfully with vulnerable people, especially children and the elderly? Please Circle:
Yes No

4) Is the applicant knowledgeable about a variety of nonphysical child management techniques? Yes No

Have you observed this person successfully use such techniques? Yes No

5) Does the applicant show any serious health, alcohol, or drug problems? Yes No
If "Yes" please explain on other side of this page.

Name _____ Signature _____ Date _____
Please print



Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, AK 99701-4137

Safe Church Program
Phone (907) 452-3040
Fax (907) 456-6552

VOLUNTEER APPLICATION FORM

Thanks for your interest in volunteering in the Episcopal Diocese of Alaska. We ask all volunteers to complete this application to match their interests and skills with the needs of the Diocese before we make a placement. Once we have chosen an appropriate setting for your services, you will be asked to comply with our Safe Church Program. Please send this completed application and any additional pages to us, attn. Ven. Anna Frank, at the above address, or e-mail to afrank@gci.net if you have any questions.

General Information

Name _____
First Middle Last

Congregation/Position: _____

Date of Birth _____ Male _____ Female _____

Home Phone # _____ Work Phone # _____ Email _____

Address _____ City _____ State _____ Zip _____

1. Dates of proposed visit/service: From _____ to _____

2. Who is funding your transport? Air fare: _____
Vehicle/s: _____

3. Do you have a specific area in mind for your trip/service? If yes, where? _____

4. What skills and interests do you want to share? _____

5. Have you ever traveled/volunteered in Alaska before? When and where? _____

6. Some of our churches/facilities have no indoor plumbing. Would this be a problem for you? Please Circle: Yes No

7. If you are traveling as part of a group, how many are in your party? _____ (Please provide Proof of Event Insurance for Groups.)

Personal Statement

Who or what inspired you to volunteer your services at this time? Please continue on the back or this page and/or additional pages as needed.



Episcopal Diocese of Alaska
1205 Denali Way
Fairbanks, AK 99701-4137

Phone (907) 452-3040
Fax (907) 456-6552

YOUTH EVENT PARENT/GUARDIAN RELEASE FORM

Name of Youth: _____ DOB: _____ Grade: _____

Address: _____
Street City State Zip

Home Phone: _____ Email: _____

Work Phone: _____ Congregation: _____

In case of emergency please contact: _____

Name: _____ Relationship: _____

Phone: _____

**COMMUNITY AGREEMENT FOR ALL PARTICIPANTS AND SPONSORS
MUST READ AND SIGN BEFORE ATTENDING YOUTH EVENT**

- Thy body shall not leave the premises without permission**
- Thou shall not puff a “weed” of any kind, space out on any pills, or drink alcohol**
- Thou shall report any injury immediately to an adult**
- Thou shall not trespass on thy neighbor’s body or self-esteem**
- Thou shall participate in all programs**
- Thou shall observe all the rules of the event, building, meeting place and the community.**
- Thou shall not bring any weapons (guns, knives, etc.)**
- Thou shall be okay!**

I understand the above agreement is designed to make the youth event best and safe as possible for everyone. I understand that if I violate any of these agreements, the peer chaplains will determine appropriate consequences. I also agree that if I am sent home because of my behavior, it will be at my parent/guardians/sponsor’s expense!

I have read the above community agreement and agree to live by these standards.

Youth Participant Signature

Date

Parent/Guardian Signature

Date

**Please return this form to: Episcopal Diocese of Alaska, 1205 Denali Way, Fairbanks, AK 99701
Phone: 907-452-3040 or 1-800-478-3043, Fax: 907-456-6552**

YOUTH MEDICAL RELEASE FORM

_____ has my permission to attend the
Name of Youth

_____ at _____ on
Event City/State

Date

I have read and signed the community agreement and understand that non compliance by my son/daughter may result in expulsion from the event. I also understand that all reasonable safeguards will be taken, but that the Episcopal Diocese of Alaska is no responsible for accidental injury. In case of a medical emergency, I, the parent/guardian of a minor, hereby authorize and consent to any x-ray examination, anesthetic, medical or surgical diagnosis of treatment or hospital care which is deemed advisable by, and is to be rendered under, the general or special supervision of any licensed medical personnel on the staff at any licensed hospital. This authorization is given in advance to provide authority and power to render care, which is deemed advisable in the best judgement of a physician.

_____ Parent/Guardian Signature	_____ Date
Birth date of Minor: _____	Date of last tetanus shot: _____
Family Physician: _____	Phone: _____
Family Dentist: _____	Phone: _____
Insurance Company: _____	Phone: _____
Name of Policy Holder: _____	Phone: _____
Any drug or food allergies: _____	
Special Needs: _____	

**YOU MUST COMPLETE ALL PARTS OF REGISTRATION FORM
 IN ORDER TO ATTEND THIS EVENT!
 BOTH THE MEDICAL RELEASE AND PARENT/GUARDIAN RELEASE MUST BE SIGNED!!**

Return this form to:

Episcopal Diocese of Alaska
 1205 Denali Way
 Fairbanks, AK 99701
 Phone: 907-452-3040 or 1-800-478-3043, Fax: 907-456-6552

FUNDS DISTRIBUTION FORM

Date: _____

Mail to: Episcopal Diocese of Alaska
 1205 Denali Way
 Fairbanks, AK 99701

From: _____

Account # **Description** **Amount**

PLEDGES AND ASSESSMENTS

5100 Arctic Coast Pledges \$ _____
 5200 Interior Pledges \$ _____
 5300 South Central Pledges..... \$ _____
 5400 South East Pledges \$ _____
 5630 Congregation Convention Assessment \$ _____
 6414 Village Clergy Housing Allowance..... \$ _____
 Other (List) _____ \$ _____

ACCOUNTS RECEIVABLE

1200 Life, Medical, Dental, Pension, Etc \$ _____

DEVELOPMENTAL LOAN FUND

1700 N/R Church: _____ \$ _____

SPECIAL OFFERINGS AND CONTRIBUTIONS

3001 Presiding Bishop’s Fund—Episcopal Relief and Development..... \$ _____
 3004 United Thank Offering \$ _____
 3116 Upper Yukon Pastoral Network..... \$ _____
 5510 Designated Contribution: Ven. Norman Elliott Scholarship Fund \$ _____
 5510 Designated Contribution: Fr. David Salmon School \$ _____
 5510 Designated Contribution: Advent Appeal \$ _____
 5510 Designated Contribution: NEST (Native Evangelistic Support Team)..... \$ _____
 5510 Designated Contribution: The Rt. Rev. Mark MacDonald Major Gifts Campaign \$ _____
 5520 Bishop of Alaska—Discretionary Fund..... \$ _____
 5550 Undesignated Contributions \$ _____
 5670 Alaskan Epiphany \$ _____
 5675 Safe Church Background Check \$ _____
 5800 FIT (Faith Into Tomorrow) \$ _____
 Other: _____ \$ _____

See Back Page.

Arctic Coast Deanery

Barrow
Kivalina
Kotzebue
Noatak
Point Hope
Point Lay

Southeast Deanery

Haines Juneau
Ketchikan
Petersburg
Sitka
Skagway
Wrangell

Designated Contributions

Advent Appeal
Alcohol Treatment
Anna's Travel
Arizona Prison Ministry
Clergy Retreat
Dancing with the Spirit
Fr. David Salmon Ministry School
NEST
Radio Show
Rev. Anna Frank's Discretionary
Special Task Force
Theological Education
Rev. Ginny Doctor's Discretionary
Norman Elliott Scholarship Fund
Lower Yukon Ministries
Delegate Assistance
Financial Discipleship Ministry
John Starr Youth Development
EFM
Mission Development
The Rt. Rev. Mark MacDonald Major -
Gifts Campaign

Interior Deanery

Allakaket
Anvik
Arctic Village
Beaver
Birch Creek
Chalkyitsik
Circle
Eagle
Fairbanks
Fort Yukon
Grayling
Hughes
Huslia
Minto
Nenana
North Pole
Rampart
Shageluk
Stevens Village
Tanacross
Tanana
Venetie

Custodial Accounts

Point Lay
Birch Creek
Grayling
Tanana
Rampart
Tanana Highway
Anvik
Stevens Village Bldg.
Eagle
Upper Yukon Pst.
Shageluk

South Central Deanery

Anchorage
Cordova
Eagle River
Homer
Kenei
Kodiak
Palmer
Seward
Talkeetna
Valdez
Wasilla

TRAVEL POLICY SUMMARY

The travel policy applies to all persons performing official travel for the diocese: diocesan staff members, diocesan officers, committee members delegates, volunteers and any others traveling on official diocesan business.

Authorization: Official travel must be pre-approved in advance by the Program Manager who has the authority to approve expenditures of diocesan funds. Each line item in the budget has an authorized official who can approve expenditure of those funds. Any questions about who can approve particular travel should be addressed to the Administrator in the diocesan office.

Travel Arrangements: Travelers are responsible for arranging their own travel. The Diocese of Alaska has hired US Travel to be our travel agent. We request that all diocesan travel be booked through our agent, US Travel. If you choose to use another agent, you will be required to complete a check reimbursement form in order to get your expenditure reimbursed. The following is our travel agents phone number and fax:

US Travel, Sue Selzer, extension 336

Phone: 800-622-6449 or 907-374-5336

Fax: 907-452-3839

Time limit on reimbursement: There will be no reimbursements for expenses if the proper receipts are not submitted within thirty (30) calendar days of completion of travel or date expense was incurred.

Following guidance covers the amount that may be reimbursable and the procedures for seeking reimbursement.

Submit Episcopal Diocese of Alaska, Request for Check/ Reimbursement form with receipts to the Administrator, Episcopal Diocese of Alaska, 1205 Denali Way, Fairbanks, AK 99701-4137.

Travel: Normally travel for the diocese is by air. Every attempt will be made to arrange for travel in sufficient time to allow use of special fares. Normally that means that arrangements should be made at least fourteen days and preferable twenty-one days in advance. Under certain circumstances, the Program Manager may authorize travel by other modes; however, any travel will be by the most direct and economical means. Only under the most unusual circumstances will travel costs be reimbursed that exceed the cost of air travel at the Economy (Y) rate. Program Managers approving travel by means other than commercial air should coordinate with the Administrator prior to such approval. For reimbursement, submit the receipt including the passenger's receipt (the last page of the ticket) within thirty (30) days. When use of privately owned vehicle is approved, the reimbursement rate will be at the current rate allowed by IRS for tax purposes.

Lodging: It is customary for travelers to stay in private homes. Doing so not only proves to be economical but also allows travelers and other members of the church family to get to visit and learn more about each other. It is fully expected that such lodging will be used when available and offered. When staying in a private home, it is appropriate to present the host/hostess with a token of appreciation with reimbursement, upon presentation of receipt and the name of the recipient, by the diocese for gifts costing less than one nights lodging in a reasonably priced hotel. When private

lodging is not offered, travelers may stay in moderately priced hotels with reimbursement, upon presentation of receipt, by the diocese. Naturally, travelers accompanied by those who are not on official diocesan business will not be reimbursed for the expenses of the companion(s). Use of commercial lodging must be approved by the Program Manager approving the travel. Submit any receipts along with the written authorization of the program manager for commercial lodging within thirty (30) days for reimbursement.

Meals: The policy of the diocese is to reimburse, upon presentation of appropriate receipts, meals for travelers up to a maximum of \$30/day. Naturally, meals that are provided at no cost to the traveler are not reimbursable. IRS regulations require that receipts presented for reimbursement must specify as separate items food, alcohol, and tax. Submit all receipts within thirty (30) days for reimbursement.

Miscellaneous Expenses: Submit original receipts (along with written authorization from Program Manager for rental car) within thirty (30) days for reimbursement.

Rental Cars: The traveler must have prior written approval of the person authorizing the travel before reimbursement will be considered for rental cars. Travelers are encouraged to seek the most economical rate. The diocese will reimburse for previously approved rentals upon presentation of receipts within the required time.

Taxi fares: Upon presentation of receipts, reimbursement will be made for taxi fares necessary to perform official travel when local transportation was not provided by host congregations or individuals. Naturally, local travel solely for the entertainment or convenience of the traveler will be at the traveler's personal expense.

Laundry and valet service: laundry and valet service, in reasonable amounts, is reimbursable upon presentation of receipts for trips that exceed five (5) days duration.

Telephone: Essential telephone calls are reimbursable in reasonable amounts.

Advances: When necessary, the Administrator will approve travel advances for official travel if requested at least twenty-one (21) days prior to travel. When advances are authorized, the amount of the advance will be an amount deemed sufficient to avoid personal hardship to the traveler. Advances must be fully accounted for with reimbursement made to the diocese of any funds advanced and for which receipts are not presented for expenses that would have been reimbursable.

Procedures: The Program Manager approving travel will submit travel form to the Administrator prior to travel. The diocese will not be responsible for travel expenses incurred without the Program Manager's approval on the travel form.

Questions: This policy is not intended to be all inclusive. Questions should be addressed to the Administrator.

Non-reimbursable expenses: The traveler will bear, without reimbursement, the costs of sight-seeing, reading material, in-room cable service, unofficial entertainment, etc. Any questions about a particular expense would be referred to the Administrator.

Failure to follow correct procedures can result in failure of the diocese to reimburse.

CHECK REQUEST OR REIMBURSEMENT

Date: _____

Email: _____

CHECK PAYABLE TO:

Name: _____

Address: _____

MAIL CHECK TO:

Name: _____

Address: _____

Itemize Expenditures
Attach receipts when available

Date	Description/Purpose	Amount
Total		

Is this a service (example: cook, instructor, honorarium) provided to the Episcopal Diocese of Alaska?

Please Circle: Yes No If yes, we need your social security number: _____

SOURCE OF FUNDS: Identify the budget account from which funds are to be taken by number and name.

Individual making request _____

Approval: Responsible Activity Chair or Staff _____

Accounting Office Use Only COMMENTS: _____

Distribution

Credit	Debit	Amount	Class	Memo

CHECK REQUEST OR REIMBURSEMENT—GENERAL INFORMATION

This form is to be used by individuals to request that a check be issued by the Episcopal Diocese of Alaska and by the Administrator to document approval to issue a check. This form along with paid receipts or other transaction documents will be used as a record to document the expenditure of diocesan funds. It may be used in association with travel, operating or other authorized expenses. This form may be used in conjunction with the Record of Expenses Form when necessary to document/list items that could not be listed on this form.

Form Preparation Instructions

Date: Enter the date the form is prepared.

Check Payable To: This space must be completed to include the full name and mailing address of the person making the expenditures and to whom the check is to be made out; to assure that the proper person is contacted should a question(s) arise concerning the entries on the form, and that proper accounts are credited.

Mail Check To: This space is to be used only when the check is to be mailed to an address other than that listed in the Check Payable To section.

Itemize Expenditures: Each expenditure associated with this request must be listed and each entry must have a receipt or narrative explanation as to why no receipt is available.

Date:	Enter the date of the expenditure.
Description:	Identify what was purchased. A short informative entry will suffice, e.g. Hotel, Book, Travel, etc.
Amount:	Enter the total amount of the expenditure, support the receipts
Total:	Enter the total of all expenditures. This will be the amount that the check will not exceed. When necessary for clarity, comments on expenditures may be entered in the description space.

Purpose: State reason for expenditures. Examples: Travel advance; Travel Reimbursement; Reimbursement of items necessary to support project or activity, etc.

Source of Funds: This space is to be used to enter the budget account to which this check is to be charged. This entry should include the Account Code number and title if known, or information that will permit the Administrator to assure proper credit is applied.

Individual making request: Enter the signature of the person preparing the form,

Approval: Enter the signature of the individual authorized to approve expenditure of fund on account listed under Source of Funds section, if other than the individual making the request.

Accounting Office Use Only: This space may be used by the Administrator to make COMMENTS related to the expenditures for accounting clarity and the record the Distribution of the expenditures to the appropriate accounts.

Receipts submission guidance: When the receipts are small, several may be taped to a letter-size sheet of paper so they will not be lost. These sheets or receipts should be attached to the Request for Check form. The total of the Itemized Expenditures must be equal to the total of the attached receipts and explanations. The individual will be reimbursed in the amount that can be supported by receipts or approved explanations and that are appropriate. The following are examples of acceptable receipts and attachments:

*Original airline ticket "Passengers Receipt" or appropriate receipt if other than travel by commercial air. An invoice or itinerary will not be accepted.

*Original itemized bill and receipt of payment from the hotel. You will be reimbursed only at the group rate at the official hotel of a meeting or convention.

*Paid receipts (originals) for all other expenses, e.g. taxi, shuttle food, etc.

*There must be a receipt or explanation for each expense entry on the form.

DIOCESAN LOAN GUIDELINES

The Diocese carries a revolving loan fund entitled "Development Loan Fund". This account has been designated for: major maintenance or replacement; purchase of land; construction; and congregational loans for these purposes.

Any congregation thinking about a loan request from the revolving loan fund must work closely with the **Investment Committee**. Among the duties of the **Investment Committee** are the two listed below:

- 1. Initially receive and analyze loan requests from parishes/missions, and **recommend action** to the Standing Committee.
- 2. **Advise** the Standing Committee on proposed purchase of real property.

Following are the steps which the congregation must take when requesting a loan:

- 1. Request forms needed for consideration of proposal from the **Investment Committee** or Diocesan Office.
- 2. Congregation sends loan proposal to the **Investment Committee**.
- 3. **Investment Committee** approves request, or works further with local congregation.
- 4. **Investment Committee** forwards their **recommendation** to **Standing Committee** for approval.
- 5. **Standing Committee** notifies parish/mission regarding status of request, and terms.
- 6. When funds are needed, request is put in to the **Diocesan Office**.

The **Standing Committee** meets only three times each year (usually in March or April -- July or August -- November or December) and requires all written committee reports be in their hands at least two weeks prior to the meeting date. **The loan process takes time -- please think ahead!**

DIOCESAN LOAN APPLICATION FORM—PAGE 1

Date: _____ Name of Congregation: _____

Address: _____ City: _____ Zip: _____

Daytime telephone: _____

Describe reason for loan request: _____

Cost of Project: \$ _____ (Submit applicable drawings and/or bids)

Less: Building funds available	\$ _____
Local funds available	\$ _____
Special fund raising	\$ _____
Other sources of funds	\$ _____
Grant:	\$ _____
Loan:	\$ _____
Other _____:	\$ _____

Total funds available: \$ _____

Amount of loan requested: \$ _____

Repayment Program: ___ 3 years ___ 5 years ___ 10 years ___ Other

DIOCESAN LOAN APPLICATION FORM—PAGE 2

What recent remodeling/renovation has been completed?

_____	Cost	\$ _____.
_____	Cost	\$ _____.
_____	Cost	\$ _____.

Indebtedness: \$ _____ Outstanding Mortgages/Loans \$ _____ Current Unpaid Bills
 Amount pledged to the diocese in dollars and percent: \$ _____ and _____%

Please be sure to submit a copy of your budget for the current year.

Return this form to: **Attn: Administrator**, Diocese of Alaska, 1205 Denali Way, Fairbanks, AK 99701

Information from parochial report: Specify Year _____

Number of Households _____	Number of Baptized Members _____
Number of Communicants _____	Number of Church School Students _____
Number of pledging Units _____	Operating Funds \$ _____.

Description of Present Site and Buildings: _____

1. Population of your parish area: 10 years ago _____ 5 years ago _____
 Currently _____ Five year projection _____

2. List position (clergy and lay staff), indicating whether full or part-time:

3. Do you currently (or do you plan to) share your facilities with the needs of the community and with other churches?

4. Do your plans call for future additions to buildings and parking?

5. Provisions for physically handicapped? Please indicate yes or no.
 _____ Ramp _____ Lift _____ Rest Rooms _____ Drinking Fountain

6. Is your congregation participating in the Church Risk Management Program?
 ___ Yes ___ No If participating, what phase of the study are you in?

7. Please attach (or list below) a brief history of your congregation, its future potential, community factors, etc.

Signature of person completing form

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