



ST. DAVID'S EPISCOPAL CHURCH & SCHOOL

MINISTRY LEADER HANDBOOK

January 30, 2015

The information contained herein is intended to provide the background, resources, and reference materials required to fulfill the Ministry Leader position.

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Letter from our Rector

Dear Ministry Leader,

Thank you so much for committing to a leadership position at St. David's where we are *transforming lives through Christ*. We truly appreciate your willingness to serve! Ministry Leadership is a big responsibility, and we want you to be as comfortable as possible with the people and processes that will support you throughout your experience.

This handbook was developed to help you get started in Ministry Leadership, and to ensure you are adequately prepared for your position. Please look over the information provided at your convenience, and contact our office if you have questions and/or would like to discuss any of the information contained herein.

Yours in Christ,

Rev. Mary Kay Brown



St. David's Contact Information

St. David's Episcopal Church & School
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Ashburn, VA 20147
Phone: 703-729-0570
Fax: 703-729-1534
office@sdlife.org
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Church Staff

Office Hours are 8:30 am – 4:30 pm, Monday – Friday

Rev. Mary Kay Brown, Rector	rector@sdlife.org
Fr. Emmanuel Johnson, Priest Associate	office@sdlife.org
Maureen Carey-Back, Lay Pastoral Assistant	mcareyback@sdlife.org
Liz Mesecher, Parish Administrator	office@sdlife.org
Caroline White, Church Financial Officer	cwhite@sdlife.org
Julie Hellstrom, Preschool Co-Director	psdirectors@sdlife.org
Ann-Marie Lanius, Preschool Co-Director	psdirectors@sdlife.org
Dan Miller, Organist & Choirmaster	music@sdlife.org
John Ware, Music Director	johnware@jwguitar.com
CeCi Sigmund, Children's Music & Contemporary Choir Director	iggitha@aol.com
Allison Weitzel, Childcare Coordinator	childcare@sdlife.org

Other Important Contact Information

Trustees: Allan Steed, Marilyn Tracy, Jeff Rubin, Eric Ruttenberg, Steve Velling	trustees@sdlife.org
Vestry	vestry@sdlife.org
Vestry Wardens	wardens@sdlife.org
[To contact an individual Vestry member, please refer to the following address on our Web site: www.sdlife.org/Leadership/Leadership]	
Communications	communications@sdlife.org



Administrative Responsibilities

As a Ministry Leader, you agree to participate in, at least, two parish Ministry Leader meetings per year; hold periodic Ministry Team meetings; and be responsible for the following:

- I. **Annual Reporting:** Preparations for annual reporting should begin each year in August, with a first draft of the following documents due NLT 30 September.

Ministry Plan – Provides an overview of the Ministry’s Goals, Objectives, and Activities. The Plan includes an overview of the Ministry’s Organization, Goals, Annual Budget, Planned Events, Fundraising Calendar, and Performance Targets.

The Ministry Plan should align with the Goals and Objectives outlined in the Parish Strategic Plan (refer to www.sdlife.org).

Ministry Membership Roster (included in plan) – List of Ministry members; Includes Ministry Leader Designation and Member Contact Information.

Ministry Accomplishments (included in plan) – Provides a brief, bulletized list of significant Ministry accomplishments.

In addition, each year Ministry Leaders may be asked to provide input to annual Parish-level reporting NLT January for the Annual Parish Meeting.

- II. **Communications:** Ministry Leaders are responsible for approving and submitting information for inclusion in the various available methods of parish communications, including review/update of the Ministry’s section of the St. David’s website (sdlife.org) at least once every quarter – ref. pg. 15, *Communications Process*.
- III. **Sexual Abuse Awareness Training:** Ministry Leaders are required to attend the Diocesan Training on sexual abuse awareness for both children and adults. Multiple training opportunities will be provided during the year.
- IV. **Periodic Reporting:** Ministry Leaders are required to review and obtain additional authorizations and/or complete additional forms and reports, to include reimbursements and check requests, as outlined in the *Policies and Procedures* section.

Annual Reporting



Strategic Ministry Plan

Ministry name

St. David's Episcopal Church

Vestry approved date: _____

WHAT:

Mission: (Description of the ministry: i.e. purpose and for whom.)

Needs Analysis: (Why does St. David's or the greater community need this ministry?)

Expected Outcomes: (Prioritize top three to five objectives. Measurements describe when and how a specific outcome will be measured/tracked.)

OUTCOMES	MEASUREMENTS

HOW:

Goals: [What are the short (1-3 years) and long term (3 to 5 years) goals for this ministry?]

GOAL	DESCRIPTION	TIMEFRAME i.e. year one; years 2-3, etc

Activities: (What activities and events occur in this ministry? Describe activities and tasks that will achieve expected outcomes.)

Strategy: (What this ministry is, what the ministry is not.)

What it is...	What it is not...

SPIRITUAL DISCIPLINES:

Spiritual Disciplines: (What spiritual disciplines does this ministry support or enhance, i.e. worship, prayer, Sabbath keeping, small group, bible study, tithing, telling your story?)

FINANCIALS:

Resources Required: (What does this ministry need to succeed i.e. money, staff resources, space, supplies, etc.?)

Budget Requests: (Please attach a detailed budget request if you require funds from St. David's to support your ministry. Budgets are not approved when the ministry plan is approved.)

Fundraising: (Plans for fundraising which include the solicitation of or communicating to parishioners events either on or off St. David's campus, must be a component of the vestry approved Strategic Ministry Plan and confirmed by the Fund Raising Committee.)

- Proposed event(s):

EVENT DESCRIPTION	PROPOSED DATE	LOCATION	\$\$ GOAL

- Potential up-front costs with explanation:

- a. Source of funds

HUMAN CAPITAL:

Ministry Leader(s):

NAME	PHONE NUMBER	ROLE

Position Descriptions: (Key positions, assignments only.)



Ministry Budget Request

Item/Activity	Description	New / Recurring Requirement	Current Year \$s	Next Year \$s



Ministry Membership Roster

Name	Position	E-mail	Phone



Report of Ministry Accomplishments

Please describe three-five accomplishments for which this Ministry was responsible this year:

1.

2.

3.

4.

5.

Policies and Procedures



St. David's Contract Management Policy

(As of January 2011)

The term St David's includes the Church, the Preschool, the Chapel, the Cemetery, the Parents of the Preschool (POPS), the Altar Guild, the Capital Campaign and/or any other entity which might need to sign a contract. Contracts are defined as legal written instruments that obligate St David's to payment(s) and which embody terms and conditions. In cases where the terms and conditions are onerous or not clearly understood, St David's General Counsel will be consulted.

Contracts will be categorized into two groups: **Property and Programs.**

Property contracts are those which arise from the physical plant and campus of St David's. Examples include electricity, gas, cleaning, burials, etc. Contracts in this category typically require specific monetary and non-monetary obligations by St David's. These contracts shall be negotiated and approved by the Trustees within the dollar limitations of the approved annual budget. The CFO shall keep copies of all these contracts. Contracts which exceed the funds budgeted for their purpose by more than ten percent will be presented to the Vestry before Trustee signature. Any Trustee can sign a property contract with the concurrence in advance of the other Trustees. In bona fide emergencies the Senior Trustee can sign a contract while informing the other Trustees within 24 hours.

Program contracts are those resulting from the performance of the approved ministries of St David's. These include employment, musical talent, carnival equipment, travel, etc. They typically require specific monetary and non-monetary obligations by St David's. These contracts shall be approved by one of the Wardens within the dollar limitations of the approved annual budget. Ministry Leaders are encouraged to negotiate with the appropriate vendor for the purpose of clarification of requirements and terms. However, each Ministry Leader must make clear to the vendor that any/all agreements between them and the vendor are subject to final approval by one of the Wardens. Any/all contracts that would obligate St. David's to an amount exceeding the balance of the associated budget line item must be approved by the Vestry prior to execution. The CFO shall keep copies of all contracts.

Any contract executed on behalf of St. David's that is not executed in accordance with this policy, to include verbal contracts/agreements, will not be considered an obligation of St David's. Rather, the contract shall become the personal obligation of the parishioner(s) who signed it and/or otherwise agreed to it.



Ministry Submissions to the Communications Ministry (As of 09/01/2014)

Web site submissions

- Send e-mail submissions to communications@sdlife.org
- Articles should be **submitted 5-7 business days prior to the expected publish date**; turnaround times may be shorter or longer pending the resource availability; we no longer have writing resources available for articles.
- If no photo or clip art has been chosen, the web publisher may select a photo or clip art.
- Article submission:
 - Ministry leaders may draft and submit an article regarding news, events, meetings, updates or happenings, etc. including photo or clip art, if available.
 - Articles may be between 300-500 words in length and follow Associated Press (AP) Style (i.e. New York Times format.)
 - Submitted articles are subject to editing for length, grammar and style at the sole discretion of the communications ministry.

Life @ St. David's (weekly printed bulletin) submissions:

- Send e-mail submissions to communications@sdlife.org
- Some articles in this publication are featured on the website, so these will have a one to two sentence overview with a link to the article.
- News or "save the date" submissions need to be submitted by noon on Monday for the next publication date (i.e. Monday, June 24 submissions are for Sunday, June 30 Life.) See chart below:

*** NOTE that the deadline for Holiday weeks is subject to change. Please check with Communications in advance. During the Christmas holiday week and the summer months Life will be published bi-weekly.**

Special Inserts to the Life @ St. David's weekly printed bulletin

These are inserts that are longer than normal Life items and printed on a separate sheet of paper. Inserts are placed inside of Life.

- Send e-mail request (text of insert can come later) to communications@sdlife.org.
- Inserts are taken on a first come first serve basis with no more than **two** running on any one Sunday. In addition, inserts run for no more than two weeks.
- Communications reserves the right to decline inserts when another Ministry is hosting the specific Sunday.
- If approved, text for inserts is due by the Life issue deadline above.
- Inserts should be between 300 and 400 words. Communications has final editing privileges on all inserts.

Happenings @ St. David's (weekly e-mail) submissions:

- Send e-mail submissions to communications@sdlife.org
- This e-mail is sent out every week on the same schedule as Life above and is mostly taken from the previous Sunday's Life print version.
- Breaking news (for that week) may be sent by 5 pm the previous Friday to be included in the e-mail (i.e. Friday, June 21 can be published as early as Tuesday, June 24, time permitting).

Weekly Sunday Verbal Announcements (made by the Vestry during services) submissions:

- Send e-mail submissions to communications@sdlife.org.
- Announcement requests should be submitted by noon on Thursdays for the following Sunday services (i.e. submit by noon on Thursday, 6/20, for announcement on Sunday, 6/23.)
- Announcement requests are prioritized by those that affect the entire parish, then timeliness of an event/activity.
- Announcements will not be accepted due to failure to meet the above deadlines for Life.
- Two to three announcements per week are given to the Vestry.
- No announcements will be accepted the day of the service (unless there is some sort of emergency, national tragedy, etc. that would clearly be exempt).



Payment of Expenses Standard Operating Procedures

(Rev. September 2014)

PURPOSE: This procedure describes the way in which payments shall be processed.

DEFINITIONS:

The term St. David's includes the Church, the Preschool, the Chapel, the Cemetery, the Parents of Preschoolers (POPS), the Altar Guild, the Capital Campaign and any other entity which can incur an obligation.

Payments include well known and regularly scheduled (recurring) obligations such as utility bills as well as one-time obligations such as books purchased for a course.

Payments also include the reimbursement of expenses paid on behalf of St. David's by individuals other than St. David's staff.

PROCESSES:

All payments to be paid by St. David's will be made by a check(s) drawn up by the Church Financial Officer (CFO) or her/his designee.

No payment shall be made that would cause a general ledger account to exceed the limits established in the approved annual budget, unless prior approval of the expense has been obtained from the Vestry. For self-funded ministries, no payment shall be made without required approvals and/or which exceeds the current available fund balance in that ministries' account, without prior approval from the Treasurer or one of the Warden(s).

All payments must be accompanied by substantiating documentation and/or approvals, as outlined below:

Recurring Payments: Payments for recurring expenses, including utilities or other contracted services, require evidence of the obligation (i.e. invoice, contract) and must be presented to the CFO for payment. No payments for recurring expenses will be made without substantiating documentation. An approved contract must be present in the CFO's files. These payments may be prepared by the CFO and signed by an appropriate signatory so long as it is consistent with the terms of the approved contract.

One-Time Payments: Payments for one-time expenses will not be made unless accompanied by evidence of advance approval (i.e. approved budget line item, completed expense authorization form), for expenses in excess of \$100, and substantiating documentation (i.e. invoice, contract). No payments for one-time expenses will be made without substantiating documentation and required advance approvals. Payments for one-time obligations must also be approved by the Treasurer, Registrar, Warden(s) or

Trustee(s) prior to being processed by the CFO, unless an approved contract and/or associated budget line item for the obligation is present in the CFO's files.

Reimbursements: Payments made to reimburse a member of St. David's for costs incurred on behalf of St. David's shall not be made unless accompanied by evidence of advance approval of the expense (i.e. approved budget line item, completed expense authorization form), for expenses in excess of \$100, and substantiating documentation, to include a completed Request for Reimbursement form. These payments may be prepared by the CFO and signed by an appropriate signatory so long as it is consistent with the advance approval.

While the Treasurer and Warden(s) may approve a payment without substantiating documentation, the exception shall be annotated on the disbursement form and the payment shall not exceed \$100.

All checks must be signed by one or more of the designated signature authorities.

These include:

1. Treasurer
2. Registrar
3. Warden(s)
4. Trustee(s)

Any check for more than \$999.99 must be signed by two of the above designees.

Either the Treasurer, Registrar, Warden(s) or Trustee(s) must approve in advance all spending exceeding \$100.00 not defined in an existing contract or included in an approved budget line item. In emergencies where advance approval is not possible, one of these managers will be notified as quickly as possible after the fact. An emergency, for this purpose, shall be defined as any situation where non-payment would cause immediate and substantial harm to St. David's and/or its parishioners.

Any expense incurred on behalf of St. David's that is not executed in accordance with these procedures and/or without required documentation, will not be considered an obligation of St David's. Rather, the expense shall become the personal obligation of the parishioner(s) who incurred the expense and/or otherwise authorized it.

DISTRIBUTION: One to each staff member, Ministry Leaders, and Vestry Member.



Financial Forms

The following forms are for use to process financial transactions through St. David's:

Expense Authorization – This form must be completed by the Ministry Leader to allow another member of the Ministry team and/or St. David's parishioner to incur expenses on behalf of St. David's.

Reimbursement Request/Check Request Form – This form is to be submitted by the Ministry Leader and/or designee (with approved Expense Authorization) for reimbursement of expenses incurred on behalf of St. David's or to initiate payment of expenses directly to a Vendor.



Expense Authorization

I _____ hereby authorize _____ to incur expense(s) on behalf of St. David's Episcopal Church, _____ (Ministry Name, if Applicable) for the following activity:

_____.

Approved Budget Line _____

Date of Activity/Expenditure: _____

Amount Requested: _____

(For amounts over \$100, please refer to Additional Authorizations, as outlined below)

I hereby authorize the above named individual to incur expenses on behalf of St. David's, and approve reimbursement of expenses up to the amount indicated above. I attest that no St. David's credit card or check will be used to make this/these purchase(s) and that no check request has been initiated for payment to any vendor for this/these purchase(s). Further, I certify that this/these items/services will not be donated by the person or vendor from which it/they will be obtained.

Signature _____ Date _____
(Ministry Leader or Other Authorizing Official)

Additional Authorization(s), as required by the Payment Processing SOP, revised October 2010:

Is this amount included in the approved Ministry budget? Yes_____ No_____

If yes, submit expense authorization form to the Church Financial Officer.

If no, please obtain additional approvals, as required (under \$100 one signature, over \$100 two signatures.)

Treasurer _____

Registrar _____

Warden _____

Trustee _____

