



HOLY TRINITY

BY THE LAKE



Guidelines for Ministry Heads And Parish Leaders

August 2015

Building on policies and procedures established by the Vestry, the Parish Office prepared these guidelines to assist those who oversee lay ministries, committees, and other organizations within the Parish. This document is broken into three main sections:

I Communications, II Budgets and Finances, and III Events and Activities.

If clarity is still needed after consulting this manual, please direct questions to the Parish Office.

I. Communications

Effective and appropriate communications are essential in making the most of our Parish's resources and maximizing participation in Parish activities.

Communications liaison for each ministry

- ◆ Each ministry should have one designated member who is responsible for communications. In most cases, this will be the Ministry Head (for example, Chair of the Finance Committee) or Chair of the Welcome Committee; but in any event, the Ministry Head will notify the Parish Office of who has been designated the communications liaison.
- ◆ The Communications/Ministry liaison should be the only person who submits communications on behalf of the group to be printed in The Newsletter or bulletin, requests expense checks for group activities, and submits proposals to the Rector or Vestry.

Communications with the Vestry

- ◆ Every Ministry Head is under a committee or ministry Liaison on the Vestry. Each Liaison makes a monthly report to the Vestry Liaison on his or her area of ministry and will be looking to ministry and committee leaders for information. Please be in frequent communication with your Vestry Liaison regarding your ministry's activities and needs.
- ◆ Vestry members can be contacted via email or telephone. This information is published in the Parish directory.
- ◆ Reports or proposals that need Vestry attention can be submitted in writing via email or hard copy to the Parish Administrator (cc-ing your Vestry Liaison) for inclusion in the Vestry meeting packet and agenda, provided such information is submitted one week before the Vestry meeting. (The Vestry meets on the third Tuesday of the month.)

Communications with Clergy and Parish Staff

- ◆ Clergy and staff can be contacted via email or phone during office hours. Appointments for meetings must be set by contacting the Parish Administrator.
- ◆ In the event of an emergency, The Rector and the Senior Warden may be contacted by text or by cell phone.

Communications with Parish at large

Articles and notices in The Newsletter and Website

- ◆ Material for inclusion in the parish newsletter must be submitted to the Parish Office by the 20th of each month deadline.
- ◆ Email is the preferred method of submission, though hard copy is also acceptable. Emailed materials should be sent in Microsoft Word format. Photos must be “attached” to the email rather than imbedded in the document.
- ◆ All materials are subject to editorial review.

Bulletin

- ◆ Material for inclusion in the Sunday bulletin must be submitted to the Parish Office (info@htbtl.org) by noon on Wednesday. For special bulletins, please contact the Parish Office for the deadline. Again, all material is subject to editorial review.

Emailing the entire parish

- ◆ All Parish-wide communication by email must be submitted to the Parish Office and sent-out through the Communications Director. Such communications must meet a standard of urgency and/or Parish-wide appeal. For instance, notices of funerals and special events (Parish Life Sunday, Pentecost, etc.) are appropriate for the whole church, but smaller scale appeals (looking for an acolyte replacement) are not.
- ◆ Parish-wide emails may be sent only through the Communications Director. Ministry Heads may send email to the Parish Office or Communications Director. Content for emails is subject to review by the Parish Office.

Posted notices

- ◆ Notices and posters about activities may be displayed in and around the Parish Hall and grounds with advance approval by the Parish Office. Notices and posters should be removed promptly after an event.

Letters

- ◆ Due to the expense of postage, letters should be used only for the most important communications and following the approval of the Parish Office. Ministry leaders should use The Newsletter, bulletin, or email for the bulk of their communications.
- ◆ Parish letterhead may be used if appropriate.

Communications within groups

- ◆ Each Ministry Head (or committee Chair) is responsible for Communications within the groups.

- ◆ Each group should have arrangements for communicating scheduling (e.g., Altar Guild service, acolyte service, counting teams, etc.), changes in rules or procedures, and other matters.
- ◆ Substitutions for ministry obligations are expressly the responsibility of each ministry. If it affects the publication of the bulletin or the Newsletter, the Parish Office should be informed when a substitution has been made. The Parish Office is not responsible for arranging substitutes, nor is it responsible for other communications within a ministry or committee.

External communications

- ◆ Communications for publication beyond the Parish are issued by the Parish Office and/or the Evangelism committee.
- ◆ Communications on behalf of individual ministries or groups, such as thank you notes for contributions and notices for specific fundraising events, are the responsibility of each ministry.

Style

- ◆ Holy Trinity's logo is available for download from the parish website. The logo should never be modified or rearranged.

II. Budgets and Finances

Effective January 1, 2015, the Treasurer adopted an Accounting and Financial Policy establishing rules and standards designed to improve financial processes and safeguard the Parish's financial integrity, including the following procedures regarding reimbursements and expenses:

Special event budgets and reimbursement

Budgeting

- ◆ To obtain reimbursement (or a Parish check for payment) of an expense associated with an event (e.g., the Church Picnic, Brotherhood of St. Andrew, Holy Trinity Players, parties, receptions, etc.), the event organizers must establish a budget in advance of the event. The budget is submitted, in advance of any purchases, to the Finance Committee or the Treasurer, who must then approve the budget before any expenditures are made.

Forms and documentation required

- ◆ Reimbursement of Parish expenditures will be made only when requested on a Check Request Form, available from the Parish Office and downloadable on the Parish's website. The form must be accompanied by documentation supporting the expenditures.

Time-table for requesting reimbursements

- ◆ Reimbursement requests submitted more than thirty days after the expenditures are not subject to reimbursement without a showing of good cause for the delay.

- ◆ Reimbursement requests for expenses made in December must be submitted within the first week of January of the next year to qualify for reimbursement.

Tax exemption certificate

- ◆ As a nonprofit organization, Holy Trinity by the Lake is exempt from paying sales tax. Thus, the Parish does not reimburse sales tax paid for Parish-related purchases.
- ◆ Before purchasing for your ministry or group, obtain a copy of the Parish's sales tax exemption certificate from the Parish Administrator. Take this certificate with you when you make the purchases. The tax exemption is for parish purchases only, not for personal purchases made at the same time.

Other financial matters

Receipts

- ◆ All contributions and other revenues toward a Parish ministry ultimately are the property of Holy Trinity by the Lake and, if paid by check, should be payable to "Holy Trinity by the Lake Episcopal Church." The ministry or group must submit all such funds to the Parish Administrator to be counted and recorded by the weekly counting teams who record all Parish receipts. The Ministry Head must make sure all checks and loose cash are designated clearly for proper recording in the Parish's records.

Accounting for ministry funds

- ◆ Each ministry or group that raises money for its activities is responsible for keeping track of receipts, expenditures, donors' names and addresses, donors' specifications regarding particular uses of amounts donated, and other details regarding funds donated for submission to the Church Treasurer.

Non-budgeted reimbursements

- ◆ Non-routine, non-budgeted expenditures over \$250 will be reimbursed if approved in advance by the Finance Committee Chair or Treasurer. Exceptions may be made for certain emergency expenditures.

III. Events and Activities

Please use the following checklist for planning any event, large or small, for your ministry. **Permission, date, and space availability**

Calendar

- ◆ Any event or activity that is not a standard item on the Parish calendar requires advance approval of the Parish Office. **You must check with the Parish Office to set the date, time, and location before planning your event.**
- ◆ Tentative dates can be placed on the Parish calendar by the Parish Administrator. Please notify the Parish Office when the final date is confirmed.
- ◆ The official Parish calendar is on our website. It is for confirmed dates only and maintained by the Parish Administrator.

- ◆ Inquire with the Parish Office about any event-related costs so that these expenses can be included in your budget. In certain cases, custodial fees may apply.

Cost and budget

- ◆ Every event must have a budget prepared in advance. See section II of this manual for details.

Fund-raising activities

- ◆ All fund-raising activities or events require the pre-approval of the Vestry. See section I about communicating with the Vestry through your Vestry Chair.
- ◆ Prior to Vestry approval, a written proposal must be sent to the Parish Office with specific information regarding the aim and scope of the project. This must be submitted at least two months in advance of the event.

Event planning

- ◆ Develop a written plan for your event. The plan should cover publicity, time, location, content, participants, supplies and materials required, fundraising and ticket sales, volunteer and other staffing needs, set-up, clean-up, and a budget.
- ◆ Please provide a set-up diagram to the Parish Office one week in advance of the event.
- ◆ Plan for child care when appropriate. The nursery is available for children five years old and younger. Contact the Parish Office to reserve the nursery and arrange for caregivers, and include the cost of child care in your budget.

Volunteers

- ◆ Plan the volunteer requirements for your event and request volunteers in sufficient time before the event.
- ◆ Volunteers working directly with children/youth must be certified through “Safeguarding God’s Children.”

Kitchen and supplies

- ◆ Think through, in advance, the supplies and equipment your event will require.
- ◆ Be mindful of Holy Trinity’s Alcohol Policy.
- ◆ Your budget should cover the cost of disposables. If you use disposables that are already in the kitchen stock, you should replace the items.
- ◆ Plan for the cleaning of items such as tablecloths (the parish has cloths for the tables) and include the cost in your event budget.



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Proposal for Fundraising Event

Contact Person:	Home Phone Number:	Vestry Liaison
Ministry:		
Date(s) Requested:	Begin Time:	End Time:
Type of Function:	Estimated Number of People:	
Set-up Requirements:		
Type of Food and Drink to be Served:		
Ticket Price/Cost		
Projected Income		
Projected Expense (List items)		
Additional Comments:		
Approved by:		

Holy Trinity Policy on Alcohol Use at Church Functions

Approved by Vestry January 15, 2008

Alcohol should not be served prior to worship or business meetings.

Request permission from the Rector before Alcohol is served at an Event.

Alcohol should not be served at events that are primarily for the Youth and Children.

All beverage and food containing alcohol should be distinctly labeled. This includes food that is flavored with liquor or cooked in alcohol. Even if the alcohol cooks out, it may be a flavor that persons in recovery may want to avoid.

Food must be available at all functions where alcohol is served.

Equally attractive, non-alcoholic alternatives must be offered as conspicuously as alcoholic beverages. If alcohol is served in glassware, then non-alcoholic alternatives should be served in glassware. Persons who wish to abstain from alcohol should be able to comfortably.

No "hard liquor" will be served at any Holy Trinity events.

The promotion of church functions must not use alcohol as an enticement to participate, nor should imply that drinking alcohol is a social requirement.

All federal, state, and local laws and ordinances must be observed. This includes regulations requiring licenses for the sale of alcohol, prohibiting the distribution of alcohol to minors, and serving alcohol to intoxicated persons. Minors are not allowed to serve alcohol.

Serving alcohol entails incurring moral and potentially legal and financial responsibility. If a person becomes intoxicated, it is expected that responsibility will be taken for the safety of that person including transportation home if necessary.

"But take care that this liberty of yours does not somehow become a stumbling block....." *Corinthians 8:9*

Amended by Vestry, October, 2014:

Wine will no longer be available at Wednesday Night Pot Luck Dinners.

When wine is available at Parish events, there will be designated pourers appointed by the Vestry to serve.