

CLERGY SABBATICAL PROGRAM

PURPOSE: Jesus took himself apart often in his ministry; to pray, to be with God, to be renewed. The Bishops' sponsored Clergy Sabbatical Program seeks to ensure that priests in the Diocese of Massachusetts have an opportunity for a time of Sabbath; for a renewal of spirit and a reaffirmation of life with God as well as opportunities for creativity and discovery for both the clergy person and the congregation.

PRINCIPLES: The following grounding principles of the Clergy Sabbatical Program inform both the selection of participants and the process:

- ~ a sabbatical and the preparation for it is a time of intentional, focused reflection and renewal for the clergy person and, hopefully, also for the congregation (parish, mission, chaplaincy, or other faith community). The actual shape of the sabbatical time is determined by the specific vocational, personal needs and desires of the clergy person and his or her family. How a congregation uses this time is also determined by that congregation's particular situation and desires
- ~ a commitment to a process of discernment coordinated by the Office of Bishop and by both the clergy and the congregation
- ~ a willingness to work in collaboration with colleagues, outside consultants, Office of Bishop, and congregational leadership in a process of discerning needs and focus
- ~ a spirit of openness to the grace and possibilities of change and renewal, the gifts of the Holy Spirit

SCOPE AND DESIGN: The number of clergy and congregations that the program can assist in any one year is limited. The availability of funds, resources available to the clergy and congregation and the degree of financial assistance needed are factors which help determine the actual number and amounts of grants. Applicants who have not had a previous diocesan-funded sabbatical will be given priority. In order to provide sabbatical opportunities for as many clergy as possible, those who receive significant outside funding may be asked to relinquish diocesan grants. This program does not fund terminal sabbaticals.

Sometimes unavoidable situations arise that necessitate placing sabbatical plans on hold. This year we are pleased to be able to offer hold to sabbatical funds for one year. Clergy who take their sabbatical more than one year after the original plans will need to resubmit an application.

The basic elements of the bishops' Clergy Sabbatical Program include four distinct phases:

Phase 1 Preparing to submit an application. Phase 1 is the preliminary work done prior to submitting an application. Using the list of reflection questions for the clergy included in this packet, a preliminary focus for the sabbatical is determined as well as an estimate of funding needed and resources available. This outline for the sabbatical may or may not change as the planning proceeds. The clergy person contacts the chair of the Sabbatical Committee to acquire an application and express an intention to be considered for this program. Application materials are also available for download from the web: <http://www.diomass.org/content/clergy-sabbatical-program>.

It is important to begin to involve the parish leadership early in the process and to seek support from the parish Vestry for the sabbatical.

In recognition that clergy need ample time for sabbatical preparation, the application is now in two parts:

The portion of the application which reflects initial conversation and asks for the support of the Vestry is due **March 31, 2012** for sabbaticals to be undertaken in 2013. Qualified applicants will be assigned a liaison from the sabbatical committee to assist with the remainder of the application

process and serve as a resource for clergy and congregation going forward. The portion of the application in which the clergyperson defines beginning plans and funding options is due **May 31st, 2012** for sabbaticals in 2013.

**Please note that application deadlines for outside funding, such as Lilly Foundation grants are considerably earlier. Please check those deadlines closely.*

Notification of acceptance for the program year 2012 is given by early July 2012.
Submit applications to the Clergy Sabbatical Committee, Attn: Ms. Clare E. Moffitt.

Phase 2 Planning the Sabbatical. Once an application has been accepted, the second phase of planning for the sabbatical begins for both the clergy and the congregation. An outside pastoral consultant is available to meet individually with each clergy person in the program. The consultant assists the clergy in reflecting upon what is present in both their vocational and personal lives and helps to determine what is needed for their refreshment and renewal. Participants in past years' sabbatical program have commented that meeting with the consultant was extremely beneficial in helping them identify what was most needed and hoped for in the sabbatical time, which then led them to change or refine their planning and goals. Some clergy decide to meet for two sessions before the sabbatical and a processing/ debriefing meeting on their return.

Clergy accepted into the program are expected to attend a gathering with the bishop for purposes of assessment of and reflection on the sabbatical. The clergy, those returning from sabbatical and those in the planning phase, will be asked to gather as group for mutual support, reflection and sharing of ideas and resources. During the same time, leaders from the congregations, most often the wardens and sabbatical planning committee members, will also be invited to meet together for their mutual support, encouragement and focusing of the sabbatical time for them. Members of the sabbatical committee will be available to consult with congregations and clergy about preparing a sabbatical plan. A brochure has been developed to assist in this and is available from the Sabbatical Committee chair.

Phase 3 Sabbatical. The suggested time frame for the Sabbatical is three months. There will be some variations to this time frame depending upon clergy vacation schedules and other agreements which might supplement the three months or alter it from being undertaken consecutively but rather over a one or two year period. It is anticipated that the actual sabbatical time for the congregation might require some ongoing assistance/facilitation from the Sabbatical Committee or other diocesan staff. The form and frequency of such assistance will be based on need and invitation.

Phase 4 Reconnecting. A critical part of the program is an intentional time of reconnecting and debriefing; to share learning and insights. It is expected that the specifics or method of this reentry for the congregation and clergy will be part of the sabbatical plan. Sample liturgies for leave-taking and re-entry are available upon request. The clergy are encouraged to meet with the outside pastoral consultant to assist with the process of reentry and integration of the sabbatical. The congregations' leaders as well as the clergy will also come together again to debrief and share their experience and learning with one another and the members of the committee. A report to the Bishops about the sabbatical by both the clergy and congregation is expected as a contribution to the ongoing development and refinement of the Clergy Sabbatical Program.

ELIGIBILITY REQUIREMENTS AND CRITERIA FOR SELECTION: All priests canonically resident in the Diocese of Massachusetts who have been in active, ordained ministry for a minimum of 10 years, in their current parish for a minimum of 5 years, and who are interested in engaging in a process of communal/ collegial discernment, whose parish/faith community is also willing to engage in such a process and which is not able to fund fully a sabbatical are eligible. Part-time priests who meet the above requirements may be eligible for a grant on a pro-rated basis. Clergy and parish/faith communities who do not need financial assistance but who would like to participate in the discernment aspect of the program may, if space and resources permit, participate as well. Selection of participants will be based on length of service, reasons for request, and financial need. The applications are reviewed and selected by the Bishops' Clergy Sabbatical Committee. The program is not able to fund terminal sabbaticals.

FINANCIAL ASSISTANCE AVAILABLE: A limited amount of funds is available for the program annually and is used to provide grants to clergy and congregations as well as cover program costs of participant gatherings and the resource of the consultant. The amount granted to each participant will of necessity be determined by the number of clergy applying and their needs and other resources available. ***Clergy and congregations (or other institutions) must sign the "Working Condition Benefit Plan for Education" which is included in the application materials in order to be eligible to receive a grant for their sabbatical. This will ensure that the funds granted will not subject the clergy to federal or state income tax on the funds granted.*** It is hoped that each congregation will pay some part of these expenses according to its ability. Long range planning for sabbaticals is essential.

APPLICATION: Applications demonstrating Vestry support are due March 31, 2012. Final clergy applications are to be submitted by May 31, 2012 for sabbaticals in 2013. Mail the Application to the attention of the Clergy Sabbatical Committee, Attn: Ms. Clare E. Moffitt, Episcopal Diocese of Massachusetts, 138 Tremont St., Boston, MA 02111. Notice of acceptance will be given by early July 2012.

QUESTIONS FOR REFLECTION BY CLERGY AND CONGREGATION

Suggested questions for the priest:

- ~What particular aspect(s) of ministry has (have) been life-giving to you in the past few years?
- ~What aspect of your ministry has drained or depleted you?
- ~Is there something other than years of service that is prompting you to request a sabbatical at this particular time?
- ~When you think about the possibility of a significant time away from the congregation, what excites you? What do you fear?
- ~As you look forward to the next five to seven years of congregational ministry, what do you long for?
- ~How will a sabbatical affect your family?
- ~What themes, questions or area of study do you intend to pursue during your sabbatical?
- ~How do you see these themes, questions or areas of study relating to your ministry in your current congregation at this particular time?
- ~What is your sense of the vestry's and wardens' commitment to this program?
- ~In what ways do you think the congregation will benefit from your sabbatical?

Suggested questions for the vestry or sabbatical planning committee

- ~What aspect of congregational life has been particularly fruitful or rich the past few years?
- ~What aspect of congregational life has seemed dead, flat, or in need of revitalization?
- ~In what ways has your congregation grown under the leadership of the current rector?
- ~In what areas would you like to see growth or continued growth?
- ~When you think about your rector's absence for an extended period of time, what do you fear? What excites you?
- ~What themes, questions or areas of reflection might the congregation pursue during the time of the rector's sabbatical?
- ~If you could recommend areas of study for your rector during sabbatical, what might they be? What prompts your answer?
- ~In what ways do you hope the congregation will benefit from the rector's sabbatical?
- ~What do you need from the bishops, diocesan staff, dean or neighboring congregations in order to enter into the sabbatical time without anxiety?

The Episcopal Diocese of Massachusetts
CLERGY SABBATICAL PROGRAM

Application Part I VESTRY LETTER OF SUPPORT

In the space below, we ask that the Vestry write a paragraph of support for the application for a sabbatical.

We would like to hear about the Vestry's understanding of this sabbatical time, its commitment to this idea, including any financial resources committed, and any questions, thoughts or concerns about this sabbatical.

Signed:

Part I: Vestry Letter of Support due by March 31, 2012 for sabbaticals planned for 2013

The Episcopal Diocese of Massachusetts
CLERGY SABBATICAL PROGRAM
APPLICATION, Part II

Name _____

Address _____

Phone _____ Email _____

How long have you been in active, ordained ministry? _____

Location of current ministry: _____ For how long? _____

Have you had a diocesan funded sabbatical? _____ Dates: _____

Are you applying for additional outside funding? _____

If so, from what agency? _____

Please answer every question:

Why are you contemplating a sabbatical at this time?

What is your preliminary idea of focus for sabbatical?

Outline of funding needs, best estimates of all costs: (please include those of your congregation as well)

Outline of funding resources: (please include those of your congregation as well)

Deadline for applications: May 31, 2012

The Episcopal Diocese of Massachusetts
CLERGY SABBATICAL PROGRAM
WORKING CONDITION BENEFIT PLAN FOR EDUCATION*

1. Purpose. The _____ Parish/Mission Working Condition Benefit Plan for Education (“the Plan”) is adopted by _____ Church (the “Employer”) effective _____ day of _____, 20 _____. The purpose of the Plan is to allow an eligible employee of the Employer to maintain or improve skills required in his/her employment as a priest. The Employer intends that the Plan qualifies as a working condition fringe benefit under section 132 of the Internal Revenue Code of 1986, as amended, and that the benefit that an employee receives under the Plan be eligible for exclusion from such employee’s income for federal income tax purposes.

2. Eligibility under the Plan. Those eligible to receive the benefits under this Plan are the priest that minister the sacrament (the “Eligible Employee”) only.

3. Benefits. The Employer shall provide the Eligible Employee with the funds not in excess of \$_____ to cover the expenses for Qualified Education (defined below) and travel expenses (i.e. amounts expended for transportation, meals, and lodging to the extent reasonable under the circumstances) that the Eligible Employee incurs while away from home primarily to obtain such Qualified Education (“Qualified Travel Expenses”).

4. Covenants by the Employee.

(a) The Eligible Employee shall use the funds provided under this Plan solely on Qualified Education and Qualified Travel Expenses.

(b) The Eligible Employee shall verify that the payment is actually used for such expenses. The Eligible Employee shall substantiate any traveling expenses by adequate records or by sufficient evidence corroborating his/her statement as to the amount of such expense, the time and place of the travel, and the purpose of the travel.

(c) The Eligible Employee shall return to the Employer any part of the payment not so used.

5. Miscellaneous.

(a) ***Amendment and Termination.*** The Employer may amend or terminate this Plan at any time.

(b) Proof of Claim. As a condition of receiving benefits under the Plan, the Eligible Employee may be required to submit whatever proof the Employer may require either directly to the Employer or to any person delegated by it.

(c) Governing Law. To the extent not preempted by any federal law, this Plan shall be governed by, and construed in accordance with and subject to, the laws of the Commonwealth of Massachusetts, provided, however, Massachusetts substantive law of conflicts of laws shall not be applied.

(d) Assignment. No benefit under this Plan may be voluntarily or involuntarily assigned or alienated by the Eligible Employee.

(e) Headings. The headings in this Plan are for reference purposes only and shall in no way affect the meaning or interpretation of this plan.

(f) Information to be furnished. The Eligible Employee shall provide the Employer with such information and shall complete and sign such forms and documents as may reasonably be requested from time to time for the purpose of administration of the Plan.

IN WITNESS WHEREOF, the Employer has executed this Plan as a sealed instrument as of the date set forth above.

NAME OF THE PARISH/MISSION/INSTITUTION:

By: _____

Name: _____

Title: _____

*** Instructions:**

Part 1. The plan name should be the name of the congregation/institution employing the clergy applying for funds.

Part 3. If adopted, this plan can be used by all clergy at a parish, current and future, for sabbatical grants. A parish is not adopting a plan for a specific cleric for a specific sabbatical. Therefore the amount in #3 should be an amount higher than the expenses for any one sabbatical. The plan can be amended by the vestry at a later date, but it would be easier to adopt one parish plan that can be used for all sabbaticals. As noted, the plan document does not call for the name of the cleric. So, the parish could include in #3 an amount they assume will never be exceeded.

This form is due before any grant money can be released by the diocese.