

## **The Episcopal Diocese of Indianapolis Ministerial Excellence Fund – Grant Guidelines January 2019**

### **Mission**

The mission of the Ministerial Excellence Fund (MEF) of the Episcopal Diocese of Indianapolis is to provide financial relief and financial literacy education to clergy and their families who are experiencing financial emergencies or distress. Recognizing the unique relationship between clergy and their congregations, the grant-making process is intentionally designed to be a catalyst for authentic and informed conversations among them regarding the unspoken financial challenges and sacrifices of ministry.

### **Who Is Eligible?**

All active, ordained clergy (priests and deacons) of the Episcopal Diocese of Indianapolis are eligible for consideration who meet two or more of the following criteria.

1. Permanently assigned to one or multiple congregations that complete parochial reports
2. Permanently assigned to a campus ministry which has been canonically defined as a congregation that complete parochial reports
3. Permanently assigned to the Bishop's staff

### **Types of Situations Meriting Consideration**

The MEF is designed to assist clergy and their families experiencing extraordinary financial distress or emergencies, which compromise clergy abilities to effectively lead their congregations. While the merits of each grant request will be evaluated independently, some examples may include the following.

- Medical expenses not covered by insurance for priest/deacon or family member such as addiction treatment requiring residential treatment, among others
- Emergency repair or replacement of a car
- In-home, non-medical care of an elderly parent not typically covered by insurance or Medicare
- Debilitating seminary student loan debt
- Immediate out-of-pocket expenses such as travel, lodging, among others, resulting from urgent family emergencies

### **Grant Awards**

Grants will be awarded from \$1,000 to \$15,000. In some cases, larger grants may be made based upon extraordinary need and extenuating circumstances. Clergy and their families may expect to receive one grant within one year, however, exceptions may be made based upon extraordinary need and extenuating circumstances.

### **Income Taxes**

It is important to note that grant recipients are solely responsible for paying all applicable income taxes based upon current IRS guidelines for the full amount of the MEF grant(s) received.

### **Personal Financial Planning and Counseling**

The Diocese of Indianapolis may require MEF grant recipients and their spouse/partner to participate in applicable personal financial education programs provided by the Church Pension Group such as Planning for Tomorrow. Additionally, grant recipients and their spouse/partner may be required to secure financial planning services from local resources recommended by the MEF Grant Committee. The diocese may pay expenses related to these services based upon the recommendation of the Grant Committee.

### **Application Process**

MEF written applications are accepted on a rolling basis, and are reviewed periodically. Once a grant is approved, funds will be awarded often within a month. ***Applications will be available on [www.pathwaystovitality.org](http://www.pathwaystovitality.org) or by contacting the Pathways Program Director, Melissa Hickman, at [melissa.e.hickman@gmail.com](mailto:melissa.e.hickman@gmail.com).*** Only written applications will be considered.

If the applicant is an assisting priest, his or her rector/vicar must co-sign the application. If the applicant is a rector, vicar or priest-in-charge the senior warden must co-sign the application. In both cases, the priest's spouse/partner must sign the application.

### **Contributions to the Ministerial Excellence Fund**

The MEF is made possible by a seed grant from Lilly Endowment Inc. who requires the diocese to make a dollar-for-dollar match through fundraising efforts. All congregations especially those whose clergy receive grants are encouraged to support the Ministerial Excellence Fund with a financial contribution.

### **Ministerial Excellence Fund Grant Committee**

The Rev. Chip Chillington, Retired, (Terre Haute)  
The Rev. Dr. John Denson, St. Paul's (Indianapolis)  
Wendell Walls, St. Francis (Zionsville)  
Natalie Weir, St. Matthew's (Indianapolis)

### **Advisors**

Brendan O'Sullivan-Hale, Canon to the Ordinary for Administration and Evangelism  
Melissa Hickman, Pathways to Vitality Program Director  
Lisa Brown, CPA, MBA and Certified Financial Planner

***These guidelines are designed to provide general direction for the Ministerial Excellence Fund. The Grant Committee reserves the right to review and modify these guidelines from time to time as needed based upon lessons learned regarding clergy financial needs and challenges.***