

***Clergy Support Fund***

***Handbook***

Anglican Diocese *of the* Upper Midwest

935 W. Union Ave., Wheaton, IL 60187

Revised May-2025

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## Introduction

We are committed, as a diocese, to valuing clergy and their families as the most vital resource we have in our life together. The Apostle Paul is clear that the New Testament “elders” have a right to be compensated fairly and cared for by the people they serve (1 Timothy 5:17-20).

Clergy and their families often experience the very same financial struggles that non clergy members experience. In addition, they have the added pressure of being a role model to their church community. And yet, clergy and their families are often overworked, overlooked, and fail to receive the same level of care that their congregants receive. Often, this burden of expectation can lead to shame, guilt, and a reluctance to communicate financial needs or request help for growth opportunities.

To that end, our diocese has a clergy support fund to assist our clergy in the kind of help that they need when difficult seasons of life come along. Galatians 6:2 says: “*Bear one another’s burdens, and so fulfill the law of Christ.*” By providing a clergy support fund we aim to reduce the economic challenges our clergy face. As the clergy help to bear the burdens for their churches, so our diocese seeks to help bear the burdens with our clergy.  
  
The Clergy Support Fund of The Anglican Diocese of the Upper Midwest is designed to help our clergy with specific financial needs: either in times of hardship or in times of professional growth.

Our principles of confidentiality are articulated on pages 2-3.

As the Bishop of the Diocese, please be assured of our gratitude for you, your family, and your service to the Lord and the church.



Bishop Stewart Ruch III

## Approved Purposes for the Clergy Support Fund

The Clergy Support Fund is limited and temporary relief for economic challenges and growth opportunities.

The following are examples of some of areas that qualify for receiving assistance from the Clergy Support Fund:

1. Medical hardships including mental health care for the clergy person or spouse and children.
2. Student loan payment relief.
3. Current or upcoming seminary expenses or other development opportunities.
4. Personal financial shortfalls needed for household expenses (mortgage, rent, utilities, food, and vehicle) or debt burden (personal loans and/or unsecured loans) sufficient to cause hardship.
5. Bereavement for immediate family (spouse and siblings, children, grandchildren, parents, or grandparents of either clergy or spouse),) funeral expenses (travel, funeral charges).
6. Sabbatical support for the clergy person, assuming the church also provides such support.

Disbursement of Funds  
  
Our preference is to pay third party entities directly on behalf of the clergy, e.g., writing a check to a seminary for tuition, rather than writing a check to the clergy. If payment(s) have already been made toward the expense in which funds are being requested, a paid invoice or receipt must be submitted showing the invoice amount and payment details.  
  
If the clergy is an employee of the diocese the funds will be reported as taxable income.

## Confidentiality and Documentation

Confidentiality is paramount when managing clergy support funds for a diocese. This ensures that the privacy of individuals receiving assistance is protected, fostering trust and dignity. Personal information including financial and personal circumstances will be handled with the utmost discretion and only shared with authorized personnel involved in the decision-making process. We will implement strict confidentiality policies that help prevent unauthorized access and misuse of sensitive data thereby safeguarding the recipient's privacy and the diocese's reputation.

Detailed records of all transactions, including applications, approvals, and disbursements, will be maintained to ensure accountability. This documentation not only helps in tracking the allocation of funds but also serves as a reference for future requests and evaluations.

Confidentiality is also held in trust with the team and church where the clergy serves. The Clergy Support Fund Team (CSFT) is authorized to establish any disbursement of funds, and if necessary, any parameters. The CSFT will consist of; the Canon to the Ordinary, the Chair and Vice-chair of the Standing Committee, and the Treasurer (including necessary accounting staff). In the event there is a conflict of interest in connection with a team member, the Bishop may designate a Standing Committee Member in place of that member.

## How do I apply for Funding?

When our diocese requests documentation for clergy support fund requests, our primary goal is to ensure that we are aiding with those who genuinely need it and to allocate our resources responsibly. Documentation helps us verify the circumstances and needs of the applicants, ensuring fairness and transparency in our support process. However, we strive to balance this need for verification with a compassionate approach, recognizing that excessive bureaucracy can be discouraging and burdensome for those seeking help. By keeping our documentation requirements straightforward and respectful, we aim to maintain the dignity of clergy applicants while ensuring that our support fund efforts are effective and efficient.

The following steps highlight the process of applying for Funding:

(1) Complete the Request Form shown in Appendix A and send it to the Canon to the Ordinary at [clergysupport@midwestanglican.org](mailto:clergysupport@midwestanglican.org?subject=[Clergy%20Support]).

Request forms will be reviewed by the CSFT in consultation with the Bishop. Further conversations and questions may be necessary.

(2) The Canon to the Ordinary will then send an email indicating if your request has been granted and when and how the funds will be disbursed.

Again, please be assured of our affection for you and your calling to the church.

## 

## Appendix A. Clergy Support Fund Request Form

Add additional pages as needed to answer the following questions

Your name Spouse’s name (if married) Last name

|  |  |  |
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1. What is your household annual gross income?
2. Do you receive a housing allowance?  Yes  No
3. Do you own or rent the home in which you currently live?  Own  Rent

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| --- |
| $ |

3b. If “Own,” what is the estimated current equity in your home? *Equity = Estimated selling price, minus the mortgage principals and estimated closing costs)*

1. Do you own any other houses or property?  Yes  No

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| $ |

4b. If “Yes,” what is the total estimated current equity?

*The next two questions are so we can determine if financial education or counseling may be helpful.*

1. List all seminars, continuing education, or college level courses in business or finance that you have completed.
2. What biblical financial stewardship classes have you taken?
3. Who are you requesting funding for?  Yourself  Immediate family member (who?)
4. What are you requesting funding for? Please describe in less than 500 words the needs you have.

|  |
| --- |
| $ |

1. How much are you requesting? Please note if more than $1,500 additional questions may apply.
2. When do you need these funds?
3. To whom should the funds be paid? (submit invoice or paid receipt with this form)
4. Is there anything else that would be helpful for the CSFT to know as they review this request?

\*Please include supporting documentation, bills, invoices, etc., related to this request. \*

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### Clergy Support Fund Team Review Form

*(for internal use only)*

Date of review:

CSF Team members:

Were other individuals involved in reviewing this individual’s request? If so, who?

Who is requesting funds?

Is there a known conflict of interest with any team members?

Considerations in reviewing the application:

Decision regarding the disbursement of funds:

What are the parameters (if needed):

e.g. split funding the request with the individual and/or church, # of appointments, may re-apply if there is further need, etc.