



Vestry Essentials Tools for New Seasoned Members
The Episcopal Diocese of Northern California
HR Basics, Legal, and Financial Matters

Diocesan Contacts:

TMRs, chart of accounts, and financial statements:

Diocesan Treasurer: John Nykamp (treasurer@norcalepiscopal.org)

Diocesan budget, human resources, property, insurance, and loan inquiries:

Director of Operations: Kati Braak (kati@norcalepiscopal.org)

Employee benefits, the Foundation, and Safe Church:

Executive Staff Support: Michelle Karimi (michelle@norcalepiscopal.org)

Congregational Development Groups and grant writing resources and opportunities:

The Rev. Canon Julie Wakelee (julie@norcalepiscopal.org)

Investment Fund Committee questions:

Sharon Morrison (smcottish@msn.com) and Peter Juvé (peter@norcalepiscopal.org)

Helpful Links:

- [Forms and Documents](#)
- [EDNC Canons & Constitutions](#)
- [Church Administration & Finance](#)
 - [TMRs](#)
 - [Parochial Reports](#)
 - [Congregation Information Forms](#)
 - [Certificate of Lay Delegate Forms](#)
 - [Congregation Range Sheet](#)
 - [Housing Resolutions](#)
 - [Policy Updates & Templates](#)
 - [Retention Policies](#)
 - [Manual Of Business Methods](#)
 - [Expense Reimbursement Forms](#)
 - [Timesheet Templates](#)
 - [Facility Use Agreement Template](#)
 - [Treasurers Materials](#)
 - [Congregation Violence Protection Plan Template](#)
 - [CA SBA Compliant Emergency Contact Form](#)
 - [File a Statement of Information](#)
- [Register w/ Attorney General to hold a raffle](#)
- [IRS 501 \(c\) \(3\) Exemption Letter](#)
- [Human Resources](#)
 - [New Hire Forms](#)
 - [Employee Change Forms](#)
 - [Termination Forms](#)
 - [Retirement Forms](#)
 - [Imputed Income](#)
- [Benefits](#)
 - [Eligibility](#)
 - [Plan Rates & Comparisons](#)
 - [Quantum Health](#)
 - [Employee Assistance Program \(EAP\)](#)
 - [Life Insurance](#)
 - [Disability Insurance](#)
- [Investment Fund Committee](#)
- [Property & Risk Management](#)
- [Safe Church](#)