

A Guide for Congregations Facing Clergy Transitions

The Episcopal Diocese of Western Massachusetts



Merciful God, be with us and guide us; open our minds and teach us; open our hearts and surround us with your love that we may feel your presence in all our works. Imbue us with wisdom and awareness of your vision as we seek a new rector and spiritual leader. Grant us an adventurous spirit, willing to attempt new tasks and face new ways, ever mindful of the need to listen more to your still, small voice than to our own fancies and desires. Grant continued grace and commitment to those who have been called to serve as members of the Profile and Search Committees, that they may become faithful companions to each other, to the Vestry and to this Parish. We ask all this through Jesus Christ, our Lord, who lives and reigns with you and the Holy Spirit, one God, now and forever. Amen.

**The Office of the Bishop
37 Chestnut Street
Springfield, MA 01103**

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A Word from the Canon for Transition Ministry

It is my great joy to work with congregations in the midst of clergy transition. This manual serves as a guide through the clergy transition process. Since context is important, each parish will work with the Canon to the Ordinary to provide the best way through the adaptive work of this transition. This is not a cookbook; it is more like a road map.

Our lives are filled with transitions large and small—the first day of school or a new job, the daily commute from home to work, a move to a new town, the moment when we bid farewell to a beloved friend. To be alive in God’s good creation is to experience transition. No created thing is exempt from the joys and struggles of transition; it takes us to the very heart of life itself.

It is by faith that we dare to make the claim that God is in the midst of all of these transitions, leading us from the wilderness of hope to the joy of the Promised Land. In the midst of our transitions God provides us with “food enough” by giving us everything we need and more. At the heart of the Biblical narrative, the story of the Exodus is about the surprising gifts of manna each day, and water from the flinty rock.

Christian Communities, as outward and visible manifestations of the living Body of Christ, are not exempt from transition. Congregations are continually transitioning from Sunday to Sunday and from season to season. Your congregation is now in the midst of a significant transition as you begin the process that leads to the call of a new rector. **Please remember that God is in your midst as you enter this transition, and will provide you “food enough” and all that you need to faithfully enter this process.** Along the way you may discover surprising new gifts.

Your Bishop and I are with you on this journey, providing you the support, encouragement and guidance you need at this time. I pledge to provide you with my prayers, consultation and the resources needed to transition successfully into the next stage of your congregation’s life. **Honest and open communication between the congregation, clergy, and the Bishop’s Office is an essential ingredient of a successful search.**

This document is intended as a roadmap of the transition process. It is not, nor should it be used as, a step-by-step guide. Each congregational situation is unique and should be treated as such. Nevertheless, it is my hope and prayer that this resource will serve as a resource to help guide you in the months ahead.

There is always a measure of uncertainty and even trepidation when a congregation is in transition. However, be assured, this is a time of great grace and promise. Parish communities

often discover in transition that they have a capacity for faithfulness, creativity, humor, and spiritual maturity that they did not know before. My hope and prayer is that you will discover new joys and opportunities to be light and salt for the world as you embark on this journey.

My thanks to the Diocese of Newark and the Diocese of Long Island for sharing their respective Guides for Congregations in Transition. Many of the best practices found here are attributable to their very good work and I am grateful for their willingness to share that work for the building up of God's reign of mercy, compassion, and hope. I also want to thank Ms. Karen Warren for her faithful work and editing of this document.

In Christ,

Rich

The Rev. Canon Rich Simpson, Transition Ministry Officer
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A Reflection on Transitions: The Parable of the Trapeze

Turning the Fear of Transformation into the Transformation of Fear

Sometimes I feel that my life is a series of trapeze swings. I'm either hanging on to a trapeze bar swinging along or, for a few moments in my life, I'm hurtling across space in between trapeze bars.

Most of the time, I spend my life hanging on for dear life to my trapeze-bar-of-the-moment. It carries me along at a certain steady rate of swing and I have the feeling that I'm in control of my life.

I know most of the right questions and even some of the answers.

But every once in a while as I'm merrily (or even not-so-merrily) swinging along, I look out ahead of me into the distance and what do I see? I see another trapeze bar swinging toward me. It's empty and I know (in that place in me that knows) that this new trapeze bar has my name on it. It is my next step, my growth, my aliveness coming to get me. In my heart of hearts I know that, for me to grow, I must release my grip on this present, well-known bar and move to the new one.

Each time it happens to me I hope (no, I pray) that I won't have to let go of my old bar completely before I grab the new one. But in my knowing place, I know that I must totally release my grasp on my old bar and, for some moment in time, I must hurtle across space before I can grab onto the new bar.

Each time, I am filled with terror. It doesn't matter that in all my previous hurtles across the void of unknowing I have always made it. I am each time afraid that I will miss, that I will be crushed on unseen rocks in the bottomless chasm between bars. I do it anyway. Perhaps this is the essence of what the mystics call the faith experience. No guarantees, no net, no insurance policy, but you do it anyway because somehow to keep hanging on to that old bar is no longer on the list of alternatives. So, for an eternity that can last a microsecond or a thousand lifetimes, I soar across the dark void of "the past is gone, the future is not yet here."

It's called "transition." I have come to believe that this transition is the only place that real change occurs. I mean real change, not the pseudo-change that only lasts until the next time my old buttons get punched.

I have noticed that, in our culture, this transition zone is looked upon as a “no-thing,” a no place between places. Sure, the old trapeze bar was real, and that new one coming toward me, I hope that’s real, too. But the void in between? Is that just a scary, confusing, disorienting nowhere that must be gotten through as fast and as unconsciously as possible?

NO! What a wasted opportunity that would be. I have a sneaking suspicion that the transition zone is the only real thing and the bars are illusions we dream up to avoid the void where the real change, the real growth, occurs for us. Whether or not my hunch is true, it remains that the transition zones in our lives are incredibly rich places. They should be honored, even savored. Yes, with all the pain and fear and feelings of being out of control that can (but not necessarily) accompany transitions, they are still the most alive, most growth-filled, passionate, expansive moments in our lives.

We cannot discover new oceans unless we have the courage to lose sight of the shore. (Anonymous)

So, transformation of fear may have nothing to do with making fear go away, but rather with giving ourselves permission to “hang out” in the transition between trapezes. Transforming our need to grab that new bar, any bar, is allowing ourselves to dwell in the only place where change really happens. It can be terrifying. It can also be enlightening in the true sense of the word. Hurling through the void, we just may learn how to fly.

From the book *Warriors of the Heart* by Danaan Parry www.earthstewards.org

PHASE I: Separation and Planning

❖❖ Notifying the Bishop's Office

It is important that the Bishop's Office be a part of the transition process from the very beginning. The transition process begins when the departing priest meets with the Bishop and they determine together when the announcement to the Vestry and congregation will be made. Generally, about 60 days' notice should be given. In the case of a retirement, however, a greater span of time may be appropriate (6 months or so) so a thoughtful transition plan may be developed. The clergy and wardens will jointly determine how the congregation will be informed of the priest's departure.

As soon as the priest announces to the wardens his or her intention to leave a congregation, the wardens will make an appointment with the Canon to the Ordinary to discuss the state of the congregation, as well as their options in the upcoming transition period. At this meeting, the wardens report generally on the congregation and are briefed in turn on what typically lies ahead for a congregation in transition.

The wardens and vestry are the formal and canonical leadership of the congregation during the interim period. As such, they hold the responsibility of choosing a course of action best suited to their particular congregation and situation. With the help of the Bishop's Office, the wardens must make arrangements for the conduct of worship and pastoral care until an interim priest is in place. When there is a gap in official ministries, the wardens can secure names of supply clergy on our diocesan website (<https://www.diocesewma.org/parish-clergy-resources/supply-clergy/>) for Sundays as needed, or make arrangements for training lay leaders who can lead Morning Prayer.

After this initial meeting, a visit from the Diocesan Transition Minister to the congregation may take the form of a meeting with the vestry and/or the full congregation, as soon after the departure of the priest as possible. The Diocesan Transition Minister will explain the various search options and share with the vestry and/or congregation) an overview of the search process as well. The Diocesan Transition Minister will then discuss what the parish can expect during the interim period so that an interim ministry plan can be made.

❖❖ Transition Team

The period immediately following the announcement of a cleric's departure can be a time of anxiety for a congregation. Strong communication and clear systems for working together

generally reduce anxiety and increase the chances for an effective transition. There is much speculation about “What will happen next?” and “How and when will we get our next priest?” As the canonical leadership during the interim period, the wardens and the vestry will be tasked with the significant responsibility of providing a clergy presence and of maintaining and supporting programs and ministry, a considerable undertaking. It is for that reason that a Transition Team can be an excellent pastoral resource for the congregation. The function of the Transition Team is to point the congregation forward in order to embrace a new vision and possibilities for itself. In the absence of a Transition Team, this work can be done by a subcommittee of the Vestry. **See: “Responsibilities of a Transition Team” (Appendix A).**

❖❖ **Saying Good-bye**

The vestry, congregation, and clergy together should plan and carry out the farewell and celebration of the priest’s ministry, generally before any formal work on the search begins (e.g., before commissioning a search committee). Whether the priest is leaving because of retirement, a call to another parish, or even because of differences with the parish, the elements of the separation process remain the same. *Much of the energy of the parish during this time should be devoted to saying “good-bye” in the best possible way.*

Clergy and wardens should be mindful that parishioners are often expressing grief and anxiety at the loss of their priest. Therefore, particular attention should be paid to openly discussing appropriate boundaries for pastoral relationships with the congregation before the clergy departs. **See, “Leave-taking Essentials” (Appendix B).**

Clergy will be invited to an exit interview with the Bishop and Canon and are strongly encouraged to set up an exit interview with their wardens and/or executive team to ensure a solid transition. **See “Clergy Exit Interviews” (Appendix C).** Until the cleric leaves, the primary tasks of the vestry and clergy are to arrange an exit interview, plan the current priest’s departure (including an appropriate farewell service) and provide opportunities for people to say good-bye in a celebratory manner. **See also: “To the Laity: Saying Goodbye Well” (Appendix D) and “Liturgy for the Ending of a Pastoral Relationship.” (Appendix E)**

❖❖ **Severance Arrangements upon Retirement (“Terminal Sabbaticals”)**

From time to time a cleric announces his or her retirement, sets an end-date and works out an arrangement in which the parish extends his or her salary and benefits beyond the actual retirement date. While such arrangements are permissible, it is important that vestries and clergy be aware of the rules and procedures governing such arrangements.

It should be said at the outset that the term “terminal sabbatical” is a misnomer and is not used in our Diocese. A sabbatical is a time of renewal or study for an active cleric who intends to return to the ministry of the congregation having been restored. The term “sabbatical” should not be applied to a priest who is ending a ministry. When a congregation has agreed to extend salary and benefits of a cleric upon his or her departure, they are agreeing to a friendly severance arrangement with their clergy. The relationship has ended (severed) but an arrangement for additional salary and benefits for a short period may be granted.

On the rare occasion that a vestry agrees to a friendly severance arrangement, the following Diocesan guidelines must be abided. 1) The cleric, the vestry and the parish must be clear that a severance arrangement does not extend the tenure of the rector. A rector retires, turns in keys, and severs canonical and fiduciary obligations and no longer associates with the parish prior to receiving severance benefits. 2) The arrangement is never to exceed three (3) months. 3) Vestries must be able to show evidence that providing severance benefits will not adversely affect the ability of the congregation to move forward in mission.

❖❖ Provision for Clergy Leadership During the Transition

Pursuant to the canons of The Episcopal Church, the Bishop, in conversation with the vestry, appoints a priest to provide clerical leadership. Depending on the particular needs and circumstances of the congregation, the Bishop will generally appoint an interim priest with some training and/or experience in interim ministry. The goal is to help the parish to address any systemic issues and to shape a call process for the parish moving forward.

The appointment of a Priest-in-Charge is an alternative approach, which has become more common, especially when the parish is less than full-time. This process is entered into after conversation with the Canon and Bishop. There are two approaches to this ministry, generally set for a period of two to three years. One is that the Priest-in-Charge has a clearly defined “term”—like an extended interim period, where the cleric is not eligible to be called as Rector. Alternatively, the Letter of Agreement can be set up so that the Priest-in-Charge *may* be called as Rector after three years. (*Under no circumstances is a full search process begun with a Priest-in-Charge in place who then becomes one of several candidates for the position of Rector.*) See **“The Interim Priest Program in the Diocese of Western Massachusetts” (Appendix F) and “The Priest-in-Charge Option of the Diocese of Western Massachusetts.” (Appendix G).**

Calling new clergy is a process of mutual discernment, engaged in by the congregation and the clergy candidates, in partnership with the Bishop and the Bishop’s Office. This exciting time of seeking the best clergy match for a congregation should be carried out prayerfully and with

faith. Each step of the discernment requires a commitment of time and resources by God's people deeply rooted in prayer.

PHASE II: Focusing the Search Process

❖❖ Initial Meeting with Canon to the Ordinary

The Canon to the Ordinary meets with the Vestry shortly after the parish has bid farewell to their rector/clergy person. The Canon works with the parish at this initial stage to establish a strong partnership with the Bishop's office and to be of service to the parish leadership. The conversation at this meeting is focused on Congregational Vitality (including missional and financial health), the conditions of the building and website, and the nature of the search process. An excellent self-assessment tool for discussing congregational vitality (or viability) can be found on the Diocesan website at:

<https://www.diocesewma.org/wp-content/uploads/2014/11/MARKS-OF-CONGREGATIONAL-VITALITY-Copy.pdf>

It is also good at this point for the vestry to begin developing a budget for the search process. **See "Sample Budget for Search Process" (Appendix K).** It is highly recommended that the Vestry develop a comprehensive financial plan, including a review of operating expenses and any capital needs. It is also highly recommended that the vestry conduct a comprehensive audit of all the property. This would include a careful review of the buildings and the development of a report stating any needed or completed improvements (i.e. furnace installed in rectory, 2007; roof on rectory needs replacement ASAP). If the parish has a rectory, there should be an honest assessment as to the conditions of the rectory. Consider having your first Vestry meeting in the rectory after the priest leaves! Our Canon for Mission Resources, Steve Abdow, is available to consult with vestries in doing this work.

❖❖ Financial Considerations

It is the responsibility of the congregation to demonstrate that it is financially able to sustain itself and provide the requisite compensation and benefits for clergy for at least a three-year period following the calling of the new clergy. A congregation, therefore, must meet the following requirements in order to undertake discernment for a new rector:

- Demonstrated ability to pay the full compensation and benefits cost of the rector for the next three years without invasion of investments/endowments
- Past and prior year audits performed and filed with the Diocese
- Timely and complete submission of congregation's parochial report
- Acceptance of and payment of diocesan assessment
- Congregation has no debt or has a viable debt repayment plan

- Submission of budgets for the past three years, current budget, and two months of current financial reports to the Canon for Mission Resources.

❖❖ **Determining a Compensation Package**

The Vestry must begin determining a Compensation Package for their new clergy person at this point. It is essential that the congregation be “above-board” and transparent about the compensation offered. There are diocesan guidelines to be followed in setting the financial terms. Diocesan policy requires that any full-time parochial priest must be paid at least the minimum total clergy compensation as determined by Diocesan Convention, but with a strong preference toward the midpoint of the range. **See the Diocesan website for current guidelines.**

❖❖ **Diocesan Requirements for Conducting a Clergy Search**

All searches in the Diocese of Western Massachusetts are undertaken on a non-discriminatory basis. Requests for the elimination of certain categories of people, based on matters such as race, color, ethnic origin, sex, marital status, sexual orientation, disabilities or age, except as otherwise provided by the canons **will not** be granted.

❖❖ **Traditional Search Process for a Rector (as outlined in this document)**

While every context is a little bit different, the process is expected to last from 10 to 15 months. The length of time to complete any given stage depends upon many variables, including the frequency of meetings, willingness of members to work independently and collaboratively, issues that need to be addressed (e.g., financial challenges or resolving conflict), and the length of time needed to develop consensus about the future direction of the congregation and develop the parish profile. The goal is to achieve a balance between efficiency and a pace that encourages thoughtful discernment, caution and thoroughness. Inevitably someone will observe that major corporations can move faster than the Church in replacing CEOs. Perhaps. But this decision should not be for a small group of insiders. The opportunity for the entire congregation to get a clearer sense of mission and vision is part of this work if the goal is to find the right match of a rector who has the gifts for the next chapter in a congregation’s life together.

Phase III: Self-Study and the Development of a Parish Brochure

❖❖ Parish Appreciative Inquiry

Using some form of Appreciative Inquiry and the Congregational Assessment Tool (CAT), the Canon to the Ordinary will work with the leadership to:

- Outline the process ahead and address questions and concerns.
- Understand history, mission and goals
- Develop an understanding for the values of the congregation, what excites them about their parish, and what they understand to be God’s preferred future for them.
- Engender a sense of considerable excitement and optimism for the future of the congregation, to create support and enthusiasm for the call process, and to help fertilize the work of the parish profile.

❖❖ Preparing Your Parish Profile

Following interpretation of the Congregational Assessment Tool (CAT) the Profile Committee will begin to work on preparing a parish profile. This product, a “story” of the parish may range from a one or two page summary to a more elaborate and illustrated booklet—although in both cases this does not need to be printed, but will be posted as a PDF file on the parish’s website. This is an opportunity for parishes, even before beginning this work to update their website as a key way of sharing their story alongside of the parish profile. Help is available from the diocesan communication minister for this work. **We strongly urge the parish to get their website “up to speed” as they work on their parish profile.** Together these will describe the personality, mission and ministry of the congregation, and focus on the uniqueness of the parish and the passions and gifts for ministry it is seeking in its next priest.

Equally important, is to ensure that up-to-date and accurate congregation financial information, as well as the elements of the clergy compensation/benefits package, be made available for inclusion in the parish brochure.

The completed Parish Brochure must be reviewed by the Diocesan Transition Minister before going to final publication. Examples are available from the Bishop’s Office.

The description of the congregation contained in the parish brochure is meant to be a representation of the community of faith on which the wardens, vestry, search committee, and congregation agree. In the experience of discernment, reflection, collaboration, and self-definition, a congregation “grounds itself” in its own reality rather than delineating the projected abilities of a new priest. The more honest and transparent a congregation is in telling its story, the greater chance of attracting appropriate candidates and the less opportunity there is for disillusionment following the call. **See “Parish Brochure Outline” (Appendix L).**

❖❖ Preparing Your Congregational OTM Portfolio

In addition to the parish brochure, the Profile committee is asked to assist the vestry in preparing the congregation’s OTM Portfolio. OTM stands for *The Office for Transition Ministry*, a ministry of The Episcopal Church assisting congregations and clergy in transition. The Office of Transition Ministry maintains the database of all congregations and clergy in the church discerning a call to new ministry. Think of it as “Match.com” for congregations and clergy.

The OTM Portfolio includes information that you would have readily at hand from your Parochial Report (i.e. basic parish data, average Sunday attendance etc.), your parish brochure, and perhaps even your Annual Report or parish strategic plan if there be one. Your OTM Portfolio includes information such as names of former rectors and the compensation offered for the new position. Your Portfolio will help us to identify quality candidates who you will want to invite into your search process. A template for your use is found in the appendix. This is not the only tool for calling clergy but it is one of the key and essential tools. **See “OTM Portfolio Template” (Appendix M).**

❖❖ A Prayer for our Search Process

Almighty God, giver of every good gift: Look graciously on your Church, and so guide the minds of those who shall choose a rector for this parish, that we may receive a faithful pastor, who will care for your people and equip us for our ministries; through Jesus Christ our Lord. Amen.

The Book of Common Prayer, page 818

The prayer above is only offered as a sample or template. One of the first things a vestry can do together is to work on their own prayer, developed for the entire congregation and prayed at every gathering for worship, vestry meetings, and ultimately search committee meetings. Invite a spirit of thoughtfulness, collaboration, and faith-building. Please don’t write a “where’s Waldo” prayer that suggests there is but ONE candidate out there whom God has already “chosen” and your job, therefore, is to go out and find that person. Rather, your work is to

become the parish God is calling you to be—so that any number of suitable candidates can better get to know your gifts and challenges toward the goal of offering their gifts in mutual ministry going forward. Many committees ask that a member of the committee act as their “chaplain” to help keep them spiritually grounded by beginning and ending meetings with prayer and encouraging the use of the Parish Search Prayer by the congregation throughout the transition period.

PHASE IV – Selecting and Commissioning a Search Committee

❖❖ The Search Committee

Once the vestry and Parish have met with the Canon to the Ordinary and the development of a Parish Brochure has begun, it is time for the Vestry to appoint a Search Committee.

Parish members may be invited by the Vestry to submit their names and other parishioners' names for consideration in the formation of a Search Committee by the Vestry. The composition of the Search Committee should reflect the parish's diversity, including people of different ages, race, gender, and from various committees and areas of parish life. **The members of the Search Committee should principally be those who are capable of assessing the knowledge, ability and skills of the candidates. The Vestry should attempt to select people with open hearts and minds who will be sensitive to the culture and dreams of the congregation as a whole. Openly disaffected persons are not helpful to a search committee, nor is it appropriate for a member of the parish staff to serve on a search committee.**

A good target number for the Search Committee is 8-10 members. One member of the Vestry (and never more than two) should serve on the Search Committee as a liaison(s) to the Vestry. This serves the purpose of keeping members of each body informed and "in synch" with the entire process. **(See Appendix H)**

❖❖ The Vestry's Charge to the Search Committee

It is important that the Vestry give a charge to the Search Committee determining the scope and extent of the search as well as a budget for the search itself and the specifics of the Compensation Package being offered to the new clergy person (including salary, benefits and housing. **See "Sample Charge from the Vestry to the Search Committee" (Appendix J).**

❖❖ The Commissioning of the Search Committee

The Vestry commissions the members of the Search Committee, if they have not already done so in the context of self-study, with the responsibility of identifying the new priest and with the ultimate presentation of his or her name to the Vestry for consideration and approval. The "commissioning" appropriately may take place during Sunday worship and signals liturgically the significant responsibility and role that the Search Committee members are assuming in the life of the congregation. **See "Sample Liturgy for Commissioning Search Committee" (Appendix K).**

PHASE V: The Search Process

Once your Parish Brochure is complete and posted on your vibrant up-to-date website and the OTM profile has been completed, with the bishop's permission you are now ready to begin receiving names and accepting applications from interested priests. Our Diocesan Website will include a direct link to your website that also indicates that your parish is now "receiving names."

Clergy Candidates who are applying to your parish will be sending materials directly to the Canon to the Ordinary who will, in consultation with the Bishop, prepare a shorter list of names to pass along to the Search Committee.

Names are received from the following sources:

- Candidates themselves, who submit their applications directly to the Canon to the Ordinary
- Candidates recommended by parishioners, whose names are also passed along to the Canon to the Ordinary
- Candidates recommended by Bishop and/or Canon to the Ordinary
- Names received through other Diocesan Transition Ministers at the bi-annual Transition Ministry Conference (March and September)

❖❖ Communication and Confidentiality

Communication with the congregation is essential. While the conduct of the deliberations and the names of nominees must remain confidential, it is important to communicate on a regular basis the progress of the process.

Confidentiality is not secrecy. Parishioners must be assured that the transition period is being well managed and that progress, however seemingly invisible, is being made. Otherwise, the members may complain that "nothing is happening." The chair of the search committee should therefore give oral updates during announcements or parish functions. If new members are elected to the Vestry in the course of the search process, it is important to bring them up to date on the status of the process.

Members of the search committee should understand how important it is to maintain confidentiality as often prospective candidates have not yet informed their own congregations that they may be in search. For search committee members to do otherwise is to risk great damage, both to the candidates and to their congregations. It is very harmful to the integrity of

the process if a search committee member “leaks” information to anyone in the congregation, including a spouse or other family member during the course of the search process. Equally important is to provide for the security of search committee files throughout the process. The diocese expects that all parties in the search process will respect confidentiality. The congregation is not to make public the names of candidates and the candidates should not make public the church where they are interviewing. This includes, but is not limited to, social media. **See “Transition/Interim Communications” (Appendix O).**

❖❖ **Narrowing the Field of Candidates**

Once the period for receiving names has passed, the search committee’s task is now to sort through the candidates’ materials efficiently and yet not arbitrarily, to the end of narrowing the field to a “**short list**” of 3-4 serious candidates. **Eliminating candidates on the basis of the clergy OTM Portfolio alone is not a recommended practice.**

At the outset, the supporting materials, such as candidates’ resumes, clergy profiles, and a cover letter help acquaint them with the potential priest and the gifts for ministry that he/she will offer to the congregation. **The Search Committee Chair should provide periodic updates concerning the Committee’s work.**

There may be candidates who have significant gifts that are not apparent “on paper,” and this information can be shared with the search committee where appropriate. **The Bishop’s Office will engage in conversation with the search committee throughout the process and reserves the right to add names to the slate.**

The goal is to ensure the richest possible pool of potential candidates for the search committee to consider. At the same time, the search committee is proceeding to screen its list of candidates by various methods, including soliciting sermons for the committee to hear or read, reviewing references, and conducting telephone or (preferably) Skype interviews.

Once the list is reduced to 3-4 names, search committee members should plan to invite the candidates to meet with them at the parish or at the home of a search committee member to introduce the candidate to the parish environment and to get to know the candidate. **See “Interviewing and Various Sample Questions” (Appendix N).**

This would also be the time to review the Parish’s financial status with the candidates by sharing your most recent financial records and by reviewing the parish’s income streams (e.g. long-term rentals, etc.). It is important for the candidates to have a clear picture of the church’s

financial stability at this time in the process. Further, the detailed clergy compensation package should also be shared and discussed.

❖❖ On-site Visitations

In times past, search committees almost always visited candidates in their current assignments. For a number of reasons the benefits of this practice are in dispute. First of all, only a representative few from a search committee are able to attend such visitations (especially if there is significant travel), thus relying on the insights of a few rather than the whole. Secondly, there is potential for search representatives to become distracted by the dynamics of the parish that they are visiting and therefore losing focus on the candidate. Third, the context of each parish will differ (some will be in large vibrant parishes, others small, and some between calls). Some would argue that a more level playing field for all is in your parish; ultimately that is where your candidates will need to fit in and this provides the same process for all, and all the members of the committee can participate. In the end, however, in consultation with your respective Canon you can decide what fits best for your Search. Either way, it is increasingly easy to watch and listen to sermons and not just read them and this practice is strongly encouraged.

❖❖ Notifying Candidates who are no longer under consideration

Throughout the screening process, the search committee as a courtesy must notify in writing those candidates whose names are no longer under consideration. It is important to remember that clergy in search often put their lives “on hold” or have to make important decisions with respect to their lives and/or their families as their own search processes unfold. Not informing them in a timely manner about the progress of the search not only shows a lack of consideration for the candidates, but also reflects poorly on both the congregation and the Diocese.

❖❖ The Short List

When the search committee has arrived at a **short list** (usually 2-3 names) of final candidates, those names **with full private addresses** should be reported to the Bishop’s Office so that a **full background check on each candidate** may be initiated. The Bishop and Canon to the Ordinary will also contact their respective counterparts in the dioceses in which the finalist have practiced significant parts of their ministry.

PHASE VI: THE CALL OF A NEW RECTOR

❖❖ The Vestry's Discernment with the Candidates

Once the search committee comes to consensus on which candidates it wishes to recommend to call as the next rector of the congregation, the names are presented to the vestry for consideration and a vote of approval. Normally, the search committee will present a final report to the vestry outlining how the gifts for ministry match the parish goals. Usually the Transition Officer is present for this meeting. **See "Sample Handoff Memo from Search Committee to Vestry" (Appendix Q).**

A typical visit would include an opportunity for the candidate to celebrate Holy Eucharist and preach (for the vestry, not the entire parish) and have an opportunity to share how their experience would help the parish meet its goals for the future during a structured interview. This would also be a good moment for a tour of the area. Prior to all of this the wardens and treasurer meet informally to review a proposed Letter of Agreement and to answer any questions the candidate may have about the parish. The goal is for the vestry to get some sense of this person's call and desire to be the next rector as well as their suitability, not to duplicate the efforts of the search committee.

By reviewing the parish position profile, candidates are acquainted generally with the financial terms the parish may offer, but during the final interview states discussion of the financial package and the general financial status of the parish must take place. Candidates coming from outside the diocese should particularly be made aware of the cost of living and long winters in New England. **See "Ground Rules for Finalists' Visits to Parish" (Appendix R).**

❖❖ Oxford Document Background Check

At the same time that names are being submitted to the vestry background checks should be initiated. Background checks concerning sexual misconduct and criminal offenses are required for all clergy at any point of transition (pre-ordination, licensing, and employment) in the Diocese of Western Massachusetts. All finalists must have complete background checks. This differs from the preliminary background screening performed by the Bishop's Office, which simply insures that candidates are priests in good standing.

The time needed to complete a formal background check may be as long as 6 weeks. It is important for the search committee and vestry to understand that a background check cannot be initiated until the Oxford Document Management Company has received the

signed forms from both the candidate and the Bishop's Office. The names of the finalists should be forwarded to the Bishop's Office as soon as possible so that the Oxford Document check can be initiated at the earliest possible moment.

The congregation is responsible for the cost of background checks, which vary depending on whether the candidate has previously completed a background check for the Diocese of Western Massachusetts or for Province One. In such cases, the results may be transferred or updated, for a cost of \$45-70. The cost of a full background check is \$140.

❖❖ Bishop's Meeting with Final Candidates

In addition to initiating the background check, the search committee chair or wardens will contact the Bishop's Office to schedule a meeting between each of the candidates and the Bishop. The purpose of this meeting is to acquaint the candidate with our diocese and to establish a relationship with the bishop. This is normally done during the candidate's visit to the parish for the personal interview with the vestry. Please be mindful that the Bishop's schedule is often heavily booked. Therefore, requests for appointments should be made at least a month in advance of the candidates' visits.

Following the Bishop's meeting and the vestry's interview of the finalists, the Bishop will provide his counsel to the vestry prior to its discernment in order to share impressions of the candidates, as well as information learned from the Bishop's and the Canon's conversations with their counterparts concerning the candidates.

❖❖ Election of a Rector

Once the Bishop has provided his counsel to the vestry they may then proceed to convene to elect their rector from the candidates that have met with the Bishop. **Please note no call may be issued or announced without the express consent of the Bishop. Please see "Canonical Process for Calling a Rector" (Appendix T).** Upon receiving the Bishop's approval, a call is then issued, a privilege traditionally enjoyed by the wardens. A call should be issued in writing, following a telephone call to the rector-elect. **Announcement of the name may not happen until the Letter of Agreement (see below) has been signed by all parties.**

❖❖ The Letter of Agreement

Details regarding the rector's terms of employment (amount of cash stipend, housing arrangements or allowance, moving expenses, benefits, and description of responsibilities) are

negotiated with the vestry and/or wardens, and are later spelled out in a formal Letter of Agreement that is concluded between the parish and the clergy person who has been called.

The Letter of Agreement is drawn up for signing by the new rector and the vestry, and then sent to the Bishop, finally, for review and signature. So long as there is general agreement on the terms, there is no requirement that the Letter be signed by the bishop prior to the announcement of the new call. Its signing completes the process and concludes it formally. Assistance from the Bishop's Office, including a template of the Letter of Agreement, is available. **Please see "Worksheet for a Letter of Agreement," (Appendix S).**

❖❖ Honoring the Search Committee/Celebrating the Interim

The Search Committee is encouraged to finish its work by writing an evaluation of the search process and filing its report with the Bishop's Office. Materials left over from the search should be disposed of in an orderly fashion since much of it is confidential in nature and inappropriate for parish archives. **See "Some Thoughts as the Search Committee Winds Down" (Appendix U).** Successful completion of the work of the search committee is also cause for celebration, either in the context of the congregation or simply by the committee itself.

Recognition of the ministry of the Interim Priest and bidding him/her goodbye merits the attention of the congregation at the end of the transition period. **See Appendix V, "Sample Farewell Liturgy to Interim."** The Bishop's Office also encourages an exit interview with the departing Interim Priest.

PHASE VII: Preparing to Welcome the New Priest

❖❖ Welcome

When the call has been issued and accepted, it is appropriate for the vestry to ask the Transition Team to serve as a committee of welcome. They will assist in the beginning of the new ministry. The Transition Team might plan coffee and dessert for small groups to assist the new rector in meeting people, provide groceries for the first week, see to it that the rector's office is ready to be occupied or provide maps and contact information for example. **See “Welcoming the New Rector” (Appendix W).** It is also important to notify the local dean so that he or she may welcome the new rector as well.

Usually the new rector is already employed in another parish. He or she must allow time for responsible departure, which includes setting a date in conjunction with the Bishop and Vestry, for saying “goodbyes,” perhaps for a bit of vacation, and for packing and moving before the new ministry begins. It is often at least two months after acceptance of the call before the new rector is in place and not uncommon for a longer period of time to be required.

❖❖ Celebration of New Ministry

It is customary after the arrival and settling in of the new rector for the parish to schedule a Celebration of a New Ministry. The rites found on page 559 of *The Book of Common Prayer* or *Enriching our Worship* are equally acceptable. The Bishop presides at this liturgy. In consultation with him, a priest is welcome to choose the preacher for this parish event. In the rare event where the Bishop is not able to be at this event, the Canon to the Ordinary may be invited to act as the celebrant on behalf of the Bishop.

Please remember to invite the clergy of the deanery to participate as appropriate. It is a good way for the new rector to meet his/her fellow colleagues in ministry as well. We encourage also the invitation of those people who have been helpful throughout this process, including the search consultant, the Interim Priest, and any clergy who have served the parish during the interim period. This liturgy marks the official end of the transition period.

❖❖ Conclusion

The new rector is in place, at last. This is in itself, a significant accomplishment. But hopefully, it is not the only benefit a parish has received from its involvement in this season of transition. Much of a parish's involvement and benefit depends upon the extent and enthusiasm of lay

participation and that, in turn, depends upon the leadership of wardens and vestry. Many parishes report discovery of exciting new dimensions in their ministry, an increased sense of identity and purpose, newly identified resources in lay leadership, or a new recognition of its relationship with the Bishop and the wider church. May all these blessings and many more be yours as you come to the close of this important time.

Moreover, the next year or so after the arrival of a new rector will be a time of adjusting expectations—on all sides. The gifts of patience, and faith, and hopes and love will all serve you well. Especially love.

Appendix A: Responsibilities of Transition Team

The Transition Team, created by the Vestry at the time of the announcement of a clergy's upcoming departure oversees the overall health of the clergy and parish in the interest of a life-giving and positive transition time. The Transition Team should be made up of about 4-6 members and meet as needed with greater time and attention often focused during the time of leave-taking and again for the welcoming of new Rector. The time of transition is an especially important time in the life of a parish, and much of the team's efforts should be centered on being the "eyes and ears" of the vestry and wardens. Recognizing that this can be a time of anxiety and uncertainty, the Transition Team should act as that calm reassuring voice that combines empathetic listening with patient understanding. It should also have a sense of what issues need to be addressed and then channeling that vital information back to the wardens and vestry. The expectation is that the team's members themselves may not do all of these tasks, but will find people to take on various responsibilities. ***One member of this Team should be on or attend vestry meetings to report on their work.***

The Team's specific tasks include:

- Provide support for whatever Clergy may be present. This means the departing Rector, the Interim, the new Rector and their families.
- Coordinate celebrations and thanksgivings for the ministry of the departing Rector including the final service.
- Monitor the transition process, which means interacting regularly with Clergy, Vestry and parishioners to listen to thoughts and concerns about the transition period.
- Enhance and enable communication throughout the transition time by supporting and sponsoring pot-luck dinners, picnics, etc. that encourage conversation.
- Serve as "spotters", noting parishioners who don't seem to be around as often and making a conscious effort at reaching out to those on the margins or those who have become disenfranchised.
- Assist the Vestry in gathering informal Focus Group information from the parishioners before the appointment of an interim.
- In some cases, to work with the Search Committee in its initial phase of gathering self-study information.
- Prepare ways of welcoming and orienting the new Rector and his/her family to both the parish and the community, including social events, small gatherings in people's homes, showing the new Rector where the stores, schools and medical services may be found. **See Appendix W, "Welcoming the New Rector."**

Appendix B: Leave-taking Essentials for Clergy

A good beginning depends on a good ending. Your parish's ability to call your successor depends on how well you leave, and on your ability to let go. Your character and integrity are demonstrated in how you leave a position. These are not commandments, rubrics or rules. They are collected wisdom, best practices and occasional humor about an important moment in the life of every ordained person, a moment of celebration, of ending, of beginning, of death, and of resurrection.

1. Inform the Bishop in writing of your leaving and the date of your last service.
2. Notify the Wardens (in person) and, with the wardens notify the Vestry of your decision to leave. Canons require the Vestry to give formal consent of your resignation.
3. The canons require the Wardens to notify the Bishop in writing that the parish is without a priest.
4. With the Wardens, send a letter to the congregation announcing that you are ending your pastoral relationship and expressing your gratitude for your mutual ministry.
5. With the Vestry, clarify the terms of unused leave or vacation time, plans for continuing contributions into the Church Pension Fund, and arrangements for insurance coverage.
6. Notify Susan Olbon in the Bishop's Office, who will facilitate conversation with the Church Pension Fund, securing the proper forms, etc. if you are retiring. *The Bishop's signed approval is required for retirement.*
7. Plan a ritual ending of your pastoral relationship within the context of worship. Refer to *The Book of Occasional Services* or *Enriching our Worship* for suggestions.
8. Plan an ending with parish organizations and staff.
9. Allow the parish to say thank you. Resist the temptation to say "Oh, nothing for me."

Communicating Your Decision

Assist the Wardens with writing a letter to the congregation that outlines your plan for leaving and assures them that they will have support and guidance from the diocesan staff through the transition.

Develop an agreement with the Vestry and let the congregation know (in writing) that,

- You value their friendship
- After you leave you will no longer be able to function as their pastor or priest
- It no longer will be your role to officiate at their baptisms, weddings, and funerals
- You will come back only at the invitation of your successor; and then,
- You will attend as their former pastor

Notify local ecumenical groups or clergy associations that you are leaving and resign from positions you hold in community organizations.

Don't "blame" this on "The Diocese" or the Bishop. The fact is we can only have one rector at a time. Treat your successor the way you would like to have been treated. They need to say goodbye to you before they can say hello to your successor.

Preparing to Go

Schedule an exit interview for yourself with the Bishop and the Canon for Transitions.

List all your current responsibilities, assigning a hand-off date, and designating a specific person to take up that task.

With the Wardens, review all leadership positions, clarify roles and responsibilities.

Update job descriptions for paid staff.

Meet privately with individuals with whom there may have been tension or conflict.

Be clear about any commitments (baptisms, weddings, funerals) you have scheduled for immediately after your leave-taking date.

Organizing For Your Successor

Review with the Wardens and Vestry their leadership responsibilities for property, finance, and administration during the transition.

Identify those in nursing homes, assisted living facilities, and homebound, noting who expects to be visited and with what regularity.

Note significant pastoral concerns such as premarital counseling, pregnancies, divorces in process, terminally ill, and the bereaved, remembering to maintain confidentiality of matters that are pastorally sensitive.

Note pre-planned funeral arrangements and where the information is filed.

Prepare a calendar for the upcoming year, including Episcopal visitations, homecoming, patronal feasts, sunrise services, graduations, every member canvas, stewardship, and annual meeting.

Leave clear instructions about your congregation's participation in community or ecumenical services, as well as their expectations about preaching and hosting future events.

Balance the discretionary fund and turn it over to the Wardens.

List any special funds, their purpose, use and signatories, including scholarships and other financial commitments.

Prepare a file of audits, parochial reports, annual reports, and copies of budgets for three years.

Identify the location of the safe and who knows the combination.

Identify the location of the bank deposit box and who has keys.

Make sure parish lists and service registers are up to date.

If you are an administrator for a church website or Facebook page—pass these responsibilities along (and remove yourself).

Preserve historic documents.

Clean out personal files. Keep what you need and carefully dispose of the rest.

Prepare a file of service leaflets for the past three years.

Prepare a file of lay reader certificates, lists of current altar guild members, ushers, acolytes, and servers with contact information (phone numbers and email addresses).

Describe unique parish customs for the conduct of worship especially weddings and funerals.

Prepare a file of current agreements and contact information for all groups that use the buildings.

Note the location of home communion set, chrism, last year's palms, the nativity set, etc.

Take out the trash. Throw away clutter that accumulated for rummage sales in closets, storage areas, or garages.

Leave a notebook. Not a 'how to' but a 'where to.' Where to get a decent haircut, find a dentist, order Chinese takeout.

Create a contact list of parish leadership, including roles and email addresses.

Turn in your keys, clearly tagged.

Change your email address. Make sure lay leaders have codes for parish social media, etc.

Establish a date certain for moving out of church-provided housing, and agree on conditions or repair and cleanliness.

Encourage and emphasize hospitality for welcoming new clergy and their loved ones. Let people say goodbye, thank you and give you their blessing.

Assist wardens in making arrangements for temporary emergency pastoral coverage immediately following your leaving.

Don't leave anything for the next priest. If it needs to be done, do it. Too many arriving clergy are sunk by things left undone.

Relating After You Leave

Arrange for change of address and mail forwarding.

After your last day, do not return to the office to check for mail, email, or phone messages.

In all cases, the responsibility belongs to clergy leaving to make clear that the pastoral relationship has ended.

Never be involved with the search process including giving names or offering opinions about candidates.

Avoid getting triangulated with members of the congregation and your successor.

Be clear that it is not appropriate for you to discuss any parish business after you leave.

Make plans to worship with another congregation.

In the absence of a rector or interim pastor, the Wardens are canonically responsible for the worship, finance, property, and administration of the parish.

Remember, you have no official or canonical role in the parish you leave, and your priestly, pastoral, and administrative functions end on the effective date of your retirement or resignation.

Resources

Oswald, Roy M., *Running Through the Thistles*. Rowman and Littlefield Publishers, 1998

Weese, Carolyn and Crabtree, Russell, *The Elephant in the Board Room*. San Francisco: Jossey-Bass, 2004

White, Edward A. *Saying Goodbye: A Time for Growth for Congregations and Pastors*. Alban Institute, Inc. 1994

Church Pension Group website at <https://www.cpg.org/>

Appendix C: Exit Interview with the Bishop and Canon

The purpose of the exit interview with the Bishop and Canon is to provide information about community life, policies, ministry and other matters regarding the parish as a rector takes his or her leave. The interview is scheduled through the Bishop's Administrative Assistant shortly after the cleric has determined that he or she will be leaving the parish.

Please provide the current annual report, a copy of the budget, and a Sunday bulletin for the exit interview with the Bishop and Canon to the Ordinary

- ❖ Describe the three greatest strengths of the parish.
- ❖ Describe the three greatest/most urgent challenges or concerns.
- ❖ What, if anything, needs immediate attention or special support?
- ❖ What was the last major decision of the leadership? List all who were involved and how was consensus reached?
- ❖ How would you describe the spiritual health of the congregations?
- ❖ How is the parish participating in God's mission of restoration and reconciliation? (Describe how the parish relates directly to the community in which it is located.)
- ❖ How would you describe the financial condition of the parish?
- ❖ What do you fear might be lost, or may lose momentum, during the transition?
- ❖ What conflict or "past history" would be helpful for a Transition Team to know about?
- ❖ What ecumenical relationships does the parish maintain or support?

Rector's Exit Interview with Parish Leadership

Parish Policies

- ❖ Review policies for the use of buildings and grounds
- ❖ Review policies and practices for weddings, funerals and baptisms
- ❖ Describe the liturgical practices of the congregation. Are there any peculiarities or strong characteristics that should be respected as we move forward through the transition?

Staff and Lay Ministers

- ❖ Name all paid staff members. Describe their duties and your relationship to them. Are they reliable and mature in their faith and practice?
- ❖ Name all key lay ministers and/or lay leaders. Describe their duties and your relationship to them. Are they reliable and mature in their faith and practice?
- ❖ Name all key volunteers. Describe their duties and your relationship to them. Are they reliable and mature in their faith and practice?

Pastoral Needs

A parish directory annotated according to members' pastoral needs (or alternately, a list of parishioner names, addresses, phone numbers and needs in writing) is a useful supplement to the exit interview. Consider including a recent pictorial directory, if available.

- ❖ Name of any particular pastoral routines, prayers, ministries in the parish (include helpful details: date/time/place/etc.)
- ❖ Do you hold services in community nursing homes? If so, which ones?
- ❖ Who are the sick and shut-ins?
- ❖ Who will need pastoral attention during the first few weeks of the interim period?
- ❖ Are there other members of the congregation who will need special attention?

Additional Information

What other information is critical to convey to help the leadership and congregation thrive in the transition ahead?

- ❖ Name the key components to what has served your ministry well over the course of your time as rector.
- ❖ Name one or two things that you would have liked to have accomplished but were unable.
- ❖ What will your successor need in place to help him/her accomplish this goal?
- ❖ If you were in conversation at this moment with the next rector, what advice or encouragement would you offer that is particular to your life, ministry, the mission of God here in this culture and context?
- ❖ Anything else?

Appendix D: To the Laity: Saying Goodbye Well

- ❖ Suggest that parishioners take time individually to share a few last words with the outgoing priest. Tie up any loose ends.
- ❖ Encourage **all parishioners** to be a part of the Farewell. Some examples:
 - Work with the Sunday School on a goodbye project
 - Check in with Vestry to see what's planned (maybe they need skit actors or someone to write a goodbye ditty for the Choir to sing)
 - Bake a cake for the last coffee hour
 - Be sure to attend the party and the last Sunday Service
- ❖ The community should give a community gift to the outgoing priest, something formal from "all of you." It can be an item or money collected ("a purse"). A gift from the Parish marks the importance of your communal relationship with the outgoing priest.
- ❖ At the final farewell, the Vestry is responsible to line up appropriate speakers, in consultation with the priest.
- ❖ A letter should be sent to the parish from the Wardens and Vestry assuring the community about services, pastoral coverage, and the next steps in the Interim Process.
- ❖ The Farewell Liturgy is the responsibility of the Priest. The Wardens should, however, be involved (either directly or through appointment) in the planning of the service.

The Vestry is responsible (along with the outgoing priest) to make sure the community understands that after the Goodbye Liturgy the pastoral relationship with the outgoing priest is ended. This means weddings & funerals in the future will be done by the Interim or the next Rector after that person is called.

Appendix E: Liturgy for the Ending of a Pastoral Relationship

From the Book of Occasional Services

This resource can be used within the context of a parish-wide celebration that best fits the needs of the local context.

Departing Minister:

On the _____ day of _____, _____, I was inducted as Rector of _____, _____, Massachusetts. I have with God's help and to the best of my abilities, exercised this trust, accepting its privileges and responsibilities.

After prayer and careful consideration, it now seems that I should leave this charge, and I publicly state that my tenure as rector of this parish ends this day. Mindful that the call to serve God is a call that comes in prayer, I now pray:

O Lord my God, I am not worthy to have you come under my roof; yet you called me to stand in your house and serve at this altar. To you and your service I have devoted myself—body, soul and spirit. In this ministry, you have filled my memory with the record of your mighty words; enlightened my understanding with the Holy Spirit; asking that I center my heart and will on what you would have me do, even as you have entrusted these people to my care.

As I leave this place, be always with me in carrying out the duties of my ministry. In prayer, quicken my devotion; in praises, heighten my love and gratitude; in preaching, give me readiness of thought and expression; that together we might fulfill the duties of a ministry of service, to you, to each other and to the whole creation of which we are stewards. All this I ask through the power of your most gracious Spirit.

Diocesan Representative or Dean (if available):

N. (Departing Minister) the work of ministry is rooted in the gifts of ministry. The people of this parish and the town have been generous in their gifts to you. I invite you to share expression of some of these gifts with them.

Departing Minister:

N. (Wardens,) Receive these keys and let the doors of this parish continue to be open to all people.

People: Amen

Departing Minister:

N. (A Deacon or Lector) Receive this Gospel Book that the Word of God may be heard by these people of God.

People: Amen

Departing Minister:

N. (Outreach Committee Chair) Receive this (symbol of parish outreach project) that you may continue to (whatever the outreach project is)

People: Amen

Departing Minister:

Receive this (other symbols of the ministries of the church as may be appropriate)

People: Amen

Diocesan Representative:

Having witnessed the exchange of gifts between (Departing Minister) and those with whom he/she has shared the honor of ministry, do you, the people of _____ Church, recognize and accept the conclusion of this pastoral relationship?

People: We do.

Departing Minister and Congregation:

O God, you have bound us together for a time as priest and people to work for the advancement of your reign on earth in this place: We give you humble and hearty thanks for the ministry that we have shared.

Silence

Especially we thank you for your never-failing presence with us through these years, and for the deeper knowledge of you, each other, and the world we serve.

Silence

We thank you for those who have been joined to this part of Christ's family through baptism, confirmation and marriage. We thank you for opening the hearts and minds of children and young people, that together with them, we might be fed by your sacraments.

Silence

And we pray for those whom we have loved whose lives we have celebrated and those spirits live with you in eternity.

Silence

Now, we pray, be with those who leave and with those who stay, and grant that all of us, drawing ever nearer to you, may always be close to each other in the communion of saints. All this we ask for the sake of Jesus Christ, your Son, our Lord. *Amen*

Appendix F: Interim Priest Program in the Diocese of Western Massachusetts

The Interim Priest is trained to assist parishes during a time of transition, especially during the period between the leave-taking of one rector and the calling of another rector. Interims are especially important when a rector has been at a parish for an exceptionally long time or there has been significant organizational or pastoral difficulty in the parish. It is an intentional ministry of sustaining the direction and ministry of a congregation as defined by the Vestry, reviewing the past, assessing the present, and evaluating the future.

The major goal of the Interim Priest's ministry is to prepare the congregation for the coming of the next rector. To this end, the Interim Priest shall:

- Celebrate Eucharist, provide pastoral care and general administrative support for the congregation while the vestry and others focus on the call of a new rector
- Deal with any internal conflicts and help heal any divisions within the congregation
- Help the Vestry, lay leaders and staff make such changes as may be needed to align parish life and administration with generally accepted standards in the Diocese.

Selection of the Interim Priest

- The Bishop through the Canon to the Ordinary will identify a suitable Interim Priest from among qualified local candidates or recruit qualified "external" candidates for the position. The diocesan office will conduct the normal background checks on candidates.
- The Bishop will recommend one candidate to the Wardens and Vestry
- The candidate meets with the Vestry. Note: Normally, this should take the form of an informal Vestry conversation (greet/meet). **The candidate is not to be subjected to a prolonged "approval" process by the parish.**
- If the Vestry and the candidate agree, a Letter of Agreement setting forth the mutual obligations and responsibilities of the Interim and the Vestry is negotiated. The appointment is official upon the approval of the LOA by the Bishop.
- If the proposed appointment of the Interim Priest is not felt to be a "good fit" by either the Vestry or the clergy person, the Bishop will draw upon that experience in order to identify another candidate for appointment. The presentation of a subsequent candidate is dependent upon the identification and availability of suitable candidates, and may require weeks or months.

Themes and Focal Points of the Interim Period

The Interim period between rectors is a prime time for the renewal and the re-energizing of the parish in its life and mission. Beyond maintaining effective ministry during this period, the Vestry and Interim shall work together, and with the Profile and Search Committees to prepare for healthy transition to the next rector. Specific themes and focus points to be addressed include:

1. **Heritage:** Reviewing how the congregation has been shaped and formed

2. **Leadership:** Reviewing the membership needs and its ways of organizing and developing new and effective leadership.
3. **Connections:** Discovering all the relationships a faith community builds outside of itself
4. **Mission:** Defining and redefining sense of purpose and direction
5. **Future:** Developing congregational and pastoral profiles.

It is the expectation of the Diocese that an Interim will be paid equivalent compensation to rectors (consistent with the Diocesan minimum as determined by the most recent Diocesan Convention).

Vestry Responsibilities

All ministries other than those reserved to ordained leadership (such as administering the sacraments) are understood as mutual ministries of the laity of the parish and the Interim. The Vestry shall lead the laity to support and cooperate with the Interim in pursuit of parish goals and in the performance of the developmental tasks of the interim period.

The Vestry is legal agent for the parish in all matters concerning its corporate property and in its relationship with the Interim. The Vestry will see that the Interim is properly supported, personally and organizationally as well as in the Vestry's financial obligations to the Interim.

Interim Responsibilities

The Interim represents and extends the ministry that is the Bishop's pastoral and canonical responsibility for congregations in leadership transition. The Interim shall lead (name) Church as pastor, priest and teacher, sharing in the councils of this congregation and of the whole church, in communion with our Bishop. The Interim shall:

- Work with the Vestry and other lay leaders to maintain the regular schedule of worship services and preaching, education, pastoral care and pastoral offices (weddings, funerals, and baptisms), calling upon the sick and shut-ins, visiting newcomers, and ongoing administration of the parish.
- Supervise all parish staff in the exercise of their responsibilities and ministries, for which they shall be accountable to the Interim.
- Function as Chair of the Vestry, and support the Vestry in its responsibilities.

The major goal of the Interim's ministry is to prepare the congregation for the coming of the next rector. To this end, the Interim may:

- Help the congregation deal with its grief and any other unresolved issues arising from the departure of the previous rector and any other clergy.
- Deal with internal conflicts and help heal any divisions within the congregation.

- Help the Vestry, lay leaders and staff make such changes as may be needed to align parish life and administration with generally accepted standards in the diocese and the Episcopal Church.

The Interim shall communicate regularly with the Canon for Transitions in the calling process, but shall not work with the Search Committee as they solicit and screen candidates. **The Interim Priest shall not under any circumstances be eligible to be a candidate for Rector.**

Appendix G: Priest-in-Charge Option in the Diocese of Western Massachusetts

A Priest-in-Charge (PIC) appointment occurs when a parish's wardens/vestry, in conversation with the Bishop, believes its congregation is not best served by initiating a search for a new rector in the present circumstances.

Circumstances indicating that the appointment of a PIC may be called for might be any one (or more) of the following:

- The parish has been served for many years by the same clergy person
- A period of instability or conflict has preceded or followed the departure of the clergy person
- A joint or collaborative ministry (e.g., cluster, merger, etc.) appears worth exploring with other parishes
- The necessary financial support for hiring new clergy is lacking and needs to be addressed
- The parish would benefit from a period of stable and consistent ministry before it turns its attention to a search
- The congregation needs to devote significant time to explore its mission/ministry identity or engage in strategic planning.

If there is agreement on the benefit of a PIC appointment, the vestry should prepare, after soliciting the congregation's input, a brief profile describing the parish, what ministry and skills it seeks in a PIC, and what it will offer to the PIC (e.g., total compensation, administrative support, its own gifts and skills).

Selection of the PIC

- The Bishop's Office will identify possible candidates from among qualified candidates for the position. Recognizing that the interim time is a period of intentional transition and change, and that a priest specifically trained in interim ministry (or with commensurate skills and experience) is the best person to accompany a parish through this transition, **it is not customary or desirable that a current Assistant or Associate be appointed as Priest-in-Charge.**
- The Bishop will recommend a candidate or candidates to the wardens and vestry.
- The candidate(s) meet with the vestry. Note: Normally, this should take the form of an informal parish or vestry conversation (greet/meet) and/or a visit by a small group to observe the clergy at the parish being served by him/her. **The process is not intended to mirror a "rector search." The Candidate(s), therefore is not subjected to a prolonged "approval" process by the parish.**
- If the Vestry and the candidate agree, a Ministry Covenant setting forth the mutual obligations and responsibilities of the PIC and the Vestry is negotiated. A standard PIC covenant of ministry is available from the Bishop's Office and at the Diocesan website. The appointment is official upon the approval of the covenant by the Bishop.

- If the proposed appointment of the PIC is not felt to be a “good fit” by either the Vestry or the clergy person, the Bishop’s Office will draw upon that experience in order to identify another candidate for appointment. The presentation of subsequent candidates is dependent upon the identification and availability of suitable candidates, and may require weeks or months.

Term of Appointment and Authority of PIC

- A PIC appointment may be for a period of one to three years, subject to modification only with the approval of the Bishop.
- The PIC shall have the authority to exercise the duties set forth in Canons III.9.3 (b) and III.9.5 of the Canons of the Episcopal Church (2009) subject to the authority of the Bishop. (See attached excerpt from the Canons).
- It is expected that within six months of the appointment the Vestry and PIC will jointly establish mutually responsible short-term and long-term expectations/goals for the mission and ministry of the parish.
- A time for mutual ministry review by vestry and clergy must be set forth in the covenant of ministry.
- With the approval of the Bishop, a PIC may be considered as a candidate for rector following a period of mutual discernment (mutual ministry review) undertaken after two full years. **The PIC may not be considered as a candidate for rector once a formal clergy search is undertaken, however.** In other words, after two years the three partners—Bishop, Vestry, and priest—decide through a mutual discernment process whether there is a call to serve as rector. If that answer is yes, no further search process unfolds. If the answer is no, a search process begins with the PIC serving the remaining time as an “interim” to prepare for the next rector.

Stages during the PIC Period

Although each congregational situation is different, there are recognizable stages throughout the tenure of the PIC. Below is a description of the stages in a three-year PIC ministry period:

1. **Introductory Stage:** Getting to know each other, building relationships; becoming familiar with the rhythm of life together; identifying conflicts/challenges; putting plan of action together
2. **Working Stage:** Working on identified ministry priorities; building trust; developing confidence in working together, using mutual ministry review to evaluate progress
3. **Discernment Stage:** Vestry/parish and clergy are visioning/discerning in relation to one another. Vestry (or designated committee) is undertaking a period of intentional self-study-----Where are we? What is our mission/ministry? What kind of clergy leadership do we need/want going forward? Is this PIC the right person to continue as Rector?

At the same time, the PIC is doing his or her own discernment about call to this parish or to ministry elsewhere.

Ministry Options for Mutual Discernment by PIC and Congregation:

- Request that PIC be called as Rector: a new LOA is created
- PIC is not called as Rector but continues as Interim during clergy search
- PIC covenant agreement with congregation is renewed for an additional period of time to make further gains in the work that needs to be done

For canonical details, see Canon 111.9.3(b) and 11.9.5 of The Episcopal Church.

Appendix H: Sample Job Descriptions for Profile Committee and Search Committee Members

Formation

Both committees are a creation of the Vestry and work for and on behalf of the Vestry. The Vestry calls members to the profile and search committees. It is important to keep in mind that in accordance with the canons of the church, only the Vestry can issue a call, and then only with the approval of the Bishop.

Process

- Vestry publishes intent to form profile and search committees
- Wardens/Vestry select a chairperson for each committee
- Wardens/Vestry confirm willingness of proposed members to serve
- Wardens and Chairs review list of proposed members
- Wardens inform chosen committee members
- Wardens announce committee membership and arrange for commissioning service

Composition of the Profile Committee

Six to eight persons are assigned the task of working with the Canon for Transition to interpret the Congregational Assessment Tool (CAT) and offer a variety of parish listening events toward the goal of telling the parish's story. This group needs to be able to facilitate a process—not huddle together to unite in a closed room. This is the opportunity for all to be heard. One Vestry member should serve as liaison to this group.

Composition of the Search Committee

The search committee should include a diverse group who are equipped for the responsibility of assessing the knowledge, ability and skills of the candidates. It should be made clear to the congregation that, though volunteers for the committee are given careful consideration, because balance of the committee is so crucial to the search process, volunteers may or may not be appointed. **It is not appropriate for staff or other clergy to serve on the Search Committee.**

The chair of the search committee ought to be appointed by the Vestry. The Senior Warden should not serve on the Search Committee since all his/her energies should be devoted to keeping the church going during the interim period. A Search Committee is normally somewhere between 8-10 persons. At least one Vestry member should be appointed to serve on the Search Committee in order to act as liaison and information link between the two bodies.

Desired Characteristics of Committee Members

In the Body of Christ, no one member possesses all the gifts. We need one another. Likewise, no one committee member will have all the desired characteristics, but together we can discern the will of God for the community. Here are some desirable characteristics for all committee members:

- Good organizational skills (Essential for the Chair of the committee)
- Team player
- Person of prayer
- Communicant in good standing (attends church regularly, giver of record, gives of time and talent)
- Willing to work for the good of the church and not partisanship
- No hidden agendas
- Can maintain confidentiality
- Comfortable with the work of assessment (Teachers often make very good search committee members!)
- Willing to set aside time necessary to engage in the search work

Appendix I: Sample Budget for Search Process

Discernment Retreat	\$500
Holy Cow Consulting fees	\$1000
Oxford Background Checks (for three finalists @ \$140/each)	\$420
Visits to Candidates' Parishes (optional)	\$2000
Final Candidate Visits to Parish	\$2000
Upgrades to Website	\$1000
Moving Expenses of New Rector	\$10,000
Celebration of New Ministry	\$500

Appendix J: Clarifying Roles

The Vestry and Wardens are the formal, elected leadership of the parish in the absence of a Rector. It is their responsibility to:

- Secure the services of clergy during the interim time
- Appoint and charge the Profile and Search Committees
- Provide both a scope and a budget for the search
- Maintain the congregation while the search is being conducted
- Develop a salary and housing package for the new rector
- Ultimately elect and call a new rector
- Negotiate the package and Letter of Agreement with the new rector

The Vestry requests that the Profile Committee assume the following responsibilities on behalf of the Vestry:

- Determine the format for and conduct a self-study of the congregation
- Write a Profile of the Parish, including web update and the necessary paperwork for the Office of Transition Ministry

The Vestry requests that the Search Committee assume the following responsibilities on behalf of the Vestry:

- Determine and employ appropriate group dynamics exercises in order to build a sense of community and common purpose, strengthen knowledge of each other and develop strong communication levels
- Establish and revise periodically as necessary, a projected timetable for fulfillment of the Search Committee's responsibilities
- Develop and implement a process for screening candidates including reviewing OTM profile, reference checks, and interviews.
- Communicate the progress of the Search Committee regularly to the parish through announcements, bulletins and newsletter articles
- Communicate with candidates promptly their status in the process
- Recommend two to three final candidates to the Vestry for election and call

Appendix K: Sample Liturgy for the Commissioning of the Profile and Search Committees

*The congregation, being seated, the Celebrant stands in full view of the people.
The Wardens and candidates stand facing the Celebrant.*

Warden: I present to you these persons to be admitted to the ministry of the Profile and Search Committees.

The Celebrant says the following:

Brothers and sisters in Christ, we are all baptized by the one Spirit into one Body, and given gifts for a variety of ministries for the common good. Our purpose is to commission these persons in the Name of God and of this congregation to a special ministry to which they are called.

The Celebrant asks the warden:

Are these persons you are to present prepared by a commitment to Christ as Lord, by regular attendance at worship, and by the knowledge of their duties, to exercise their ministry to the honor of God, and the well-being of God's church?

Warden: I believe they are.

Celebrant: You have been called to a ministry in this congregation. Will you, as long as you are engaged in this work, perform it with diligence?

Candidates: I will.

Celebrant: Let us pray.

Eternal God, the foundation of all wisdom and the source of all courage: enlighten with your grace the Profile and Search Committees of this congregation, and so rule their minds, and guide their counsel that in all things they may seek your glory and promote the mission of your Church, through Jesus Christ our Lord. **Amen**

In the Name of God and of this congregation I commission you as members of the Profile and Search Committees of _____ Church.

Appendix L: Suggested Parish Profile Outline

Every congregation's story is different and hence every profile will reflect those differences and have its own unique style. Some churches find carrying a theme throughout helps them to focus their story, but this is not necessarily the only approach. It is best to adopt a style of "telling your story" that is open, honest, and hopeful.

In the interest of good stewardship, the Bishop's Office recommends a brief one to two page (or perhaps trifold) profile in lieu of the traditional multi-page booklet. The parish profile should also be posted on the congregation's website providing easy access for prospective candidates. Whatever format you choose, the essential part of any parish profile should include:

- **Introduction:** Who we are, including a *brief* history of the parish
- **Where we are located;** A brief geographical and demographic overview of the community in which the church is located.
- **Our Mission and Ministry:** An overview of the church's mission goals, visions and dreams. More detailed information about the buildings and property, including photographs, can be put on the website.
- **Financial Information:** A statement of current financial and budget information about the congregation; compensation; housing information.
- **Gifts and Ministry of the Congregation:** as a partner in ministry with the clergy, the congregation describes the skills and abilities of its members and how they contribute to its ministry and mission. It is also an opportunity to indicate areas in which the congregation discerns it needs to grow the potential gifts of its people.
- **Gifts and Ministry of the Clergy:** Finally a statement about the kind of person the parish is searching for to be a companion with them in their journey toward fulfilling their mission and vision, including leadership style, clergy gifts for ministry sought by the parish, and other expectations and challenges for the new rector.

Appendix M: Community OTM Portfolio

OTM stands for the Office for Transition Ministry. This is a ministry of The Episcopal Church. The OTM maintains and develops the database of all clergy, congregations and institutions in the Episcopal Church. Your OTM Portfolio is an important tool for identifying clergy who might be good candidates for your congregation. In reverse, your presence in the OTM database makes it possible for searching clergy to discover you.

Church Name: _____

City: _____

Address: _____ Phone: _____

Contact Information:

Name: _____ Address: _____

City/State: _____ Phone: _____

Average Sunday Attendance _____

Worship Service Numbers: Weekend _____ Weekday _____ Others _____

CURRENT Annual Compensation (includes all the following):

Cash Stipend: \$ _____ Housing Allowance: _____

Utilities included: \$ _____ Utilities NOT included: _____

SECA Reimbursement: \$ _____

This is: Full _____ Half _____ time

Additional Compensation Note: (20 words)

Compensation available for NEW Position: \$ _____

(Includes Stipend, Housing, SECA); Negotiable: Yes _____ No _____

Housing available for _____ persons (if Rectory provided or offered)

Pension Plan: Church Pension Fund _____ Other? _____

Healthcare Options: Full family _____ Clergy +1 _____ Clergy Only _____ Other _____

Negotiable _____

Dental (yes/no) _____

Budgeted Housing Equity Allowance: Yes No If yes, amount: \$ _____

Vacation Weeks (check one): 4 weeks One Month (including 5 Sundays)

Other (Please indicate # of weeks and days): _____

Continuing Education: # Weeks _____ Funding _____

Details: _____

Sabbatical Provision (check one): Yes No Negotiable

Link to Diocesan Sabbatical (Renewal Leave) Policy:

<https://www.diocesewma.org/grant-opportunities/clergy-renewal-leave/>

Travel amount: \$ _____

Professional/Business Account (check one): Yes Amount: \$ _____ No

Comments (20 words): _____

Previous incumbents in this position:

Name: _____ Date Began: _____ Date Ended: _____

Name: _____ Date Began: _____ Date Ended: _____

Name: _____ Date Began: _____ Date Ended: _____

NOTES (100 words):

Schools:

Children: Students _____ Leaders _____

Teens/Young Adults: Students _____ Leaders _____

Adults: Students _____ Leaders _____

Day School (Check those that apply): PreK K K-6 K-12 Other

Students: _____ # Teachers: _____ Total Staff: _____

NARRATIVE:

In our baptism we promise to proclaim by word and example the Good News of God in Christ, seeking and serving Christ in all persons. You are invited here to reflect on your ministry by responding to five or six of the following questions you may answer in multiple languages, if appropriate. Attach a sheet with the answers to these questions:

1. Describe a moment in your worshipping community's recent ministry that you recognize as one of success and fulfillment.
2. Describe your liturgical style and practice for all types of worship in your community.
3. How do you practice incorporating others in ministry?
4. As a worshipping community, how do you care for your spiritual, emotional and physical well-being?
5. How do you engage in pastoral care for those beyond your worshipping community?
6. Describe your worshipping community's involvement in either the Wider Church or geographical community.
7. Tell about a ministry that your worshipping community has initiated in the past 5 years. Who can be contacted about this project?
8. How are you preparing yourself for the Church of the future?

If you were to identify the gifts/skills you need in leadership as you move into the future, which words would you use to best describe these? (100 words max):

CONNECTIONS:

Your worshipping community's website:

REFERENCES

Please provide contact information for the following references:

BISHOP NAME: _____

CONTACT INFO: _____

DIOCESAN TRANSITION MINISTER NAME: _____

CONTACT INFO: _____

CURRENT WARDEN/BOARD CHAIR NAME: _____

CONTACT INFO: _____

PREVIOUS WARDEN/BOARD CHAIR NAME: _____

CONTACT INFO: _____

SEARCH CHAIR NAME: _____

SEARCH CHAIR CONTACT INFO: _____

PARISH/INSTITUTION LEADER NAME: _____

PARISH/INSTITUTION LEADER MINISTRY: _____

PARISH/INSTITUTION LEADER CONTACT INFO: _____

LOCAL COMMUNITY LEADER NAME: _____

LOCAL COMMUNITY LEADER RELATIONSHIP TO PARISH/INSTITUTION _____

LOCAL COMMUNITY LEADER CONTACT INFO: _____

Appendix N: Interviews, Interviewing & Various Sample Questions

The most important aspect of the interview process is to be clear about what one hopes to learn in asking a question. In the first stage, the written questions used to cull the initial list down to something more manageable, the aim is to get an accurate and comprehensive snapshot of the person. During a phone interview, the aim is greater depth into who the person is and the suitability of that person as a match for the parish.

Finally, when interviewing the finalists face to face, the questions need to be evidence-based. In other words, what has the person done in the various areas that are important to the congregation? The best indicator of what a person will do is what that person has done. In any interview, avoid asking questions that can be answered by a single word, generally “yes” or “no.” Rather, ask open-ended questions that ask for specific examples of past job behavior. Try not to give the person the answer you are asking for in the context of the question. In other words, if you are a parish with a strong youth component, don’t say “We have a lot of young people in our parish and are seeking someone to build our youth programs. Tell us, how do you feel about young people?”

After asking a question, take the time to listen. The longer one listens, the more evidence one is able to gather. Let the candidates talk first. Taking time to share concerns and issues in the parish comes only after the candidate has had his/her opportunity to talk about himself or herself, and their own ministry, hopes and dreams.

These questions are all just sample ideas. The search committee in consultation with the search consultant will no doubt come up with the questions they feel are appropriate to the particular parish, but these are offered to provide a place to start in the thinking process.

Sample Initial Written Questions – Optional (Use no more than 2):

- What particular gifts do you offer to this congregation?
- What in our parish profile prompted you to consider becoming our rector?
- What leads you to consider a new position at this time?
- In the past 5 years of your ministry, what is the accomplishment of which you are most proud?
- Include at least one question based on past performance relevant to the needs of the particular parish, i.e., *Please tell us about a time when....*

Sample Questions for Phone and Face-to-Face Interviews by Search Committee:

- Please comment on our profile. Do you see something missing that is important in your ministry? Is there something present that would be a challenge to you?
- What do you do for fun? (or) What book is by the side of your bed right now?
- What has brought you the greatest joy in your ministry? What do you enjoy the least?
- Describe a situation in which theological difference led to conflict in your parish. What did you do to handle the situation?
- When you first came to your present parish, if you knew then what you know now, what would you have done differently?
- Have you seen the Mission, Vision and Covenant documents for the Diocese of Western Massachusetts? Please comment.
- How do you handle the balance between vocation and home life?
- Describe your prayer life/spiritual discipline.
- Describe your sermons. How do you prepare them; what kinds of topics do you address; what is the place of the Bible, current events, or your own experiences?
- How would you describe your leadership style, with staff, Vestry, parishioners and the community?
- Tell us about your involvement in community and Diocesan activities.

Sample Questions for Finalists

- Tell me about a time in your ministry when you felt most alive, most energized, most excited. What was this time, who was involved, and why does this particular incident stand out? **(This is the most important question of all and should be asked of all final candidates!)**
- Tell us about a time when things weren't going well
- In the past 3 years has your parish reached its stewardship goals, and, if not, why not? What is your theology of stewardship and how do you see your role?
- What would you like to tell us about yourself that will help us to know you better? What can we tell you about us?
- One of the particular areas for growth at _____ is _____. Tell us how you have addressed this in other parishes in which you have served.
- Having come this far on your journey with us, what excites you about coming here? What do you think you could bring us?

Appendix O: Transition/Interim Communications

Timely and informative communications throughout the interim period builds trust and ownership for all involved. The goal is open, thorough, and regular communication. Experience suggests the healthiest standard is “full disclosure, no surprises.” Another way to think about it is that there are “no secrets” in the process. However, maintaining confidentiality regarding the identity of candidates allows clergy to safely explore new calls so it is the one exception to the full transparency goal.

Confidentiality: In order to protect the confidentiality of clergy interested in exploring whether they are a match, and in order to minimize anxiety in other congregations (since only one priest will be called), everyone involved in the search process should maintain strict confidentiality regarding specific individuals throughout and following the process. A break in the confidentiality of privileged information can be seriously damaging not only to a candidate and the candidate’s ministry, but also to the congregation, Search Committee, and Vestry.

Communication with the Vestry: Any group(s) working on self-study or search, do so on behalf of the Vestry. A report from such a group should be part of every Vestry meeting. In addition, any such group should include some Vestry ownership as the Vestry will ultimately call a new rector.

Communication with the Congregation: Redundancy is the key—special mailings to the parish; weekly announcements at worship by the Search Chair or Warden; regular articles in worship leaflets; information on your website; and the parish newsletter are all critical to a faithful and successful process.

Communication with the Bishop: The Bishop is responsible for approving a final call so should be kept informed of progress in the transition process. The responsibility for this lies with the Wardens and Search Chair, and is exercised through the Bishop’s office. The Consultant is also a regular part of this communication chain. It is especially important to keep the Bishop’s office posted regarding the status of the Diocesan clergy who may be in your process.

Communications with Candidates: It is critical to maintain regular communication with each priest involved in your search—assuring that you keep them well informed of the status of the search process and clear about their own status.

It is impossible on paper to overstress the importance of maintaining regular communication with the candidates. It is not uncommon for search processes to fail because of poor communication between committee and candidates.

Appendix P: Communicating with Clergy Applicants

Throughout this process you will need to have careful, confidential and pastoral communications with all clergy applicants. How you communicate with clergy matters. Timely, professional and pastoral communications will both help move your process along and also communicate to the clergy your own care for them in this process. Your solid and pastoral communications will help to strengthen your process. Poor communications will likely erode your process.

Typical Communications in the Initial Search Process:

1. **Initial email stating that OTM and letter of interest have been received.** “We wanted to take a moment to let you know that we have received your OTM materials. We are still in the process of receiving names. However, you should expect to hear from us with more information within a month’s time. In the meantime, please pray for us as we enter into a process that will result in the call of a new rector for St. Swithans. You can be assured of our prayers for you as you discern your next steps in ministry.”
2. **Letter stating that you would like to get to know them better.** “We have enjoyed reading your OTM Portfolio and believe you might have the gifts and skills for ministry needed for the life and ministry of St. Swithans at this time. We would like to get to know you better and would like you to get to know us better.
3. **Letter stating that you no longer wish to continue on with them.** “...Thank you for taking the time to enter into the search process here at St. Swithans. After thoughtful review of your materials in relationship to our parish brochure and parish OTM portfolio we have decided not to have you continue on with us further. We wish you every blessing and pray God’s strength and encouragement be with you as you discern your next steps in ministry.
4. **Contact a semi-finalist to set up a phone interview.**
5. **Contact a semi-finalist to tell them that their name will be forwarded to the Vestry for their consideration.** It is best practice to handle this by phone.
6. **Contact a semi-finalist to tell them that post-phone interview they are no longer being considered for the position.** If you are not going to handle this by phone you can use a form similar to #3 above.
7. **Vestry Contact with FINALISTS to set up meetings with Vestry and Bishop.** These are handled by phone.
8. **Vestry Contact with FINALISTS who are not being considered.** These must be handled by phone and should be made in a timely manner. Remember, these folks have become very invested in this process all along. You now have a relationship with them.

Appendix Q: Sample Handoff memo from Search Committee to Vestry

To: The Vestry

From: The Search Committee

Since our first meeting on (date) we have been dedicated to finding priests whose gifts and experience would be the best match for (congregation name). Having begun with the names of (number) priests, we are pleased to present the names of these (number) priests that we believe are the best match.

The candidates are presented to you unranked and in alphabetical order. We have attempted to present their varied experience and gifts without bias. We have also attempted to present you with facts about the candidates, but not our analysis of those facts or our thoughts about their potential implications for (congregation name). Each of us could comfortably imagine any of these persons as our rector and priest. We also will enthusiastically support any of them as the next rector of (congregation name).

We appreciate what a challenging task lies before you and trust your leadership to discern which of these persons will be the best match for our parish at this time. We have committed ourselves to praying for you and trust that the Spirit will lead you as it has led us.

Thank you for the privilege of serving you, (congregation name), and God in this way. We have all grown from this experience.

1. Some operating principles that worked for us and we strongly recommend to you:
 - a. Context is everything: look for the priest who will be the best match for your current challenges and opportunities, not some idealized “best priest.” What is the work that lies ahead?
 - b. Emphasize that you are seeking God’s will
 - c. Treat each other with mutual respect and trust and fellow discerners
 - d. Share responsibility for prayer and scripture
 - e. Be open and honest with each other and with the candidates
 - f. Be sensitive to the candidates and to each other
 - g. Ask for prayers (and remember you have ours)
 - h. Be careful about communications with candidates
 - i. **Maintain confidentiality**
2. SUMMARY Information on Candidates (Attached):
 - a. What drew us to the candidate

- b. What we believe we know about: match issues, personal life, personality/style, extra-parochial ministry, how the candidate sees our gifts and challenges, why a move makes sense for this priest now and why to us
 - c. Our thoughts about implications for the parish if this person is called
 - d. What we did on the candidates' first visit to our community:
 - i. 4:00 p.m. Meet at (congregation name); tour neighborhood and building
 - ii. 5:00 p.m. Informal gathering
 - iii. 5:20 p.m. Supper (modest catering)
 - iv. 6:15 p.m. Formal interview
 - v. 8:30 p.m. Compline
 - vi. 9:00 p.m. Candidate leaves; sharing of initial reactions
3. You might want to use second visits to let them know more about:
- a. Specifics regarding our building
 - b. Specifics regarding our finances
 - c. Our outreach
 - d. The Diocese of Western Massachusetts
 - e. Yourself: We enjoyed the informal supper time prior to the formal interview and began each formal interview by going around the table and telling something about ourselves
4. Among other things we think you will want to further discuss:
- a. Their relationship with their Vestry
 - b. Their management style and experience
 - c. Their experience with mutual ministry review/evaluation
 - d. Housing and salary
 - e. Other issues that have arisen along the way unique to this call. Don't assume it will all work out through avoidance; have the hard conversations before extending a call, not after

PRAYER FOR THE CALLING OF A NEW RECTOR:

Almighty God, Giver of every good gift: look graciously on your Church, and guide the hearts and minds of those who shall choose a rector for this parish, that we may receive a faithful pastor, who will care for your people and equip us for our ministries; through Jesus Christ, our Lord. Amen (BCP p. 818)

Appendix R: Ground Rules for Finalists' Visits to Parish

- ❖ Do remember that this time is a two-way interview. The candidate (and his or her family) is as interested in finding out about you as you are him/her.
- ❖ Do contact the Bishop's Office as early as possible to set up face to face meetings with the Bishop. Scheduling these meetings can require up to a month in lead time. Please remember to call before you make travel arrangements for out of town finalists.
- ❖ Do plan to show the candidate the surrounding area and some of the local high spots
- ❖ Do allow for some "down time" for the candidate to reflect on his/her experience in your parish
- ❖ Decide in advance with whom the candidate should meet (i.e., search committee only, search committee & vestry, etc.) and be consistent. Candidates and church staff, including the Interim, may be invited to meet each other as well.
- ❖ Do take care of all logistics prior to the candidate's arrival. Arrange for his/her transportation, including flights if necessary, pick-up at the airport, etc. Book (and pre-pay) a hotel room, make arrangements for the family to visit the local school (if appropriate), etc.

Note: Under no circumstance shall the spouse of a candidate participate in an actual candidate/vestry interview meeting.

Appendix S – LETTER OF AGREEMENT WORKSHEET

Date: _____

Name Of Parish: _____ City: _____

Name of Clergy Candidate: _____ Position: _____

Hours of work per week (if part time) _____ Days off per week _____
(Full-time clergy are expected to work 40-44 hours per week)

If part time, how many Sundays per month? _____

Vacation _____

(Commensurate with hours of work, i.e. full-time rector receives minimum 4 weeks' vacation;
half time receives minimum of 2 weeks)

Continuing Education time (Minimum of 1 week/year for full-time _____)

Compensation:

See diocesan website for <https://www.diocesewma.org/wp-content/uploads/2017/11/2018-Compensation-Guidelines-for-Clergy-and-Lay-Employees.pdf>

- If a Rectory is provided, Cash Salary \$ _____
- If a Rectory is provided, Housing Equity Allowance \$ _____
- If housing is **NOT** provided, Cash & Housing Allowance \$ _____
- One-half of Social Security \$ _____
- Continuing Education Budget (Min. \$750 for full-time \$ _____)
- Reimbursement for travel and business \$ _____

Health and Pension:

(The congregation will pay required assessments to the Church Pension Fund and the premiums for medical and dental insurance in accordance with Diocesan Policy)

- Pension fund contribution (18% of cash and housing value) \$ _____
- Health Insurance:
 - For clergy person only
 - For clergy and spouse

- For clergy and family □
 - Health Insurance Total: \$ _____
- Moving Expenses: \$ _____
- Yearly budget set aside for sabbatical funds: \$ _____

(Note: these funds are for the use of the priest to pay educational expenses for sabbatical; it is expected that the parish will plan ahead for sabbatical clergy coverage as well)

Appendix T: Canonical Process for Electing a Rector

The election of a rector is a canonical process with a few important steps. Please take a moment to review Canon III.9 and the procedural checklist below. Questions? Please do not hesitate to contact the Bishop's Office.

Constitution and Canons of the Episcopal Church

Canon III.9 The Appointment of Priests

(2) No parish may elect a Rector until the names of the proposed nominees have been forwarded to the Ecclesiastical Authority and a time, not exceeding sixty days, given to the Ecclesiastical Authority to communicate with the Vestry, nor until any such communication has been considered by the Vestry at a meeting duly called and held for that purpose.

(3) Written notice of the election of a Rector, signed by the Wardens, shall be forwarded to the Ecclesiastical Authority. If the Ecclesiastical Authority is satisfied that the person so elected is a duly qualified Priest and that such Priest has accepted the office to which elected, the notice shall be sent to the Secretary of the Convention, who shall record it. Race, color, ethnic origin, sex, national origin, marital status, sexual orientation, disabilities or age, except as otherwise specified by these Canons, shall not be a factor in the determination of the Ecclesiastical Authority as to whether such person is a duly qualified Priest. The recorded notice shall be sufficient evidence of the relationship between the Priest and the Parish.

Procedural Checklist for Parishes calling Rector having been through the Search process:

- A. The warden forwards (in writing) the lists of nominees to the Bishop. (Generally these are the names presented by the search committee to the vestry.)
- B. The Bishop's Office in concert with the warden schedules meetings with the Bishop for each nominee. After the Bishop has met with all the nominees, he provides his counsel to the wardens and vestry. (Note: The Bishop still has the authority at this point to remove a nominee from the search process.)
- C. Having received the counsel of the Bishop, the vestry is permitted to convene for the purpose of electing their rector.
- D. Wardens provide (in writing) to the Bishop notice of successful election of rector, including the date of the election and the vote that has been made part of the vestry

minutes, using the language contained in the Canons of the Episcopal Diocese of Western Massachusetts.

Procedural Checklist for Parishes going from Priest-in-Charge to Rector

- A. Wardens, on behalf of the vestry, request permission (in writing) of the Bishop to elect their Priest-in-Charge as their called Rector. This often prompts a three-way discussion between the Bishop (or designee), the Priest-in-Charge and the vestry.
- B. With the Bishop's consent vestry may hold an election
- C. Wardens provide (in writing) to the Bishop notice of successful election of rector, including the date of the election and the vote that has been made part of the vestry minutes.

Important Note:

The Announcement of the call of a new rector may not happen until the rector, wardens and Bishop have signed the Letter of Agreement.

Appendix U: Some Thoughts as the Search Committee Winds Down

- You have done an incredible job in your discernment of the next clergy partner for your congregation, and are to be commended for your hard work and dedication. Your hard work should not go unnoticed or unappreciated. A private or public celebration of what you have accomplished should be planned by the Vestry.
- Because of the unique experience of transition discernment in the life of your congregation, a member(s) of the Search Committee may wish to write an evaluation of its work, noting the surprises and challenges throughout the process. The evaluation/summary should be made a part of your parish's archives and a courtesy copy sent to the Bishop's Office. If you made use of a search consultant during the process, you may wish to ask for an evaluation from the consultant as well.
- As a general rule, materials and documents left over from the search should be disposed of in an orderly fashion since much of it is confidential in nature and inappropriate for parish archives. Here are some examples:
 - Evaluations, lists, notes, reports, and profiles of all candidates
 - Resumes, OTM profiles, sermons, questionnaire responses of candidates
 - Correspondence of any nature with candidates or with the Office of the Bishop
 - Reports and recommendations to the Vestry concerning the candidates
 - Minutes of search committee meetings
 - Visitation and hospitality arrangements for candidates
 - Documents concerning candidate compensation and benefits
 - Oxford document information and investigative reports
- However, materials related to the Parish Brochure, including the results of parish surveys (unless confidential), parish-wide conversations, visioning forums and the like should be retained for future use in setting goals and expectations with the new rector.
- Specific work done with the Interim Priest if not of a confidential nature might be kept, particularly if it provides insight into issues of which the new rector ought to be made aware. Again, most records and documents specifically related to the selection/appointment of the Interim should be destroyed.
- Directives from the Vestry to the search committee involving process, search/brochure budget or expectations may be retained as useful information for future clergy or staff searches.
- Liturgical celebrations and planning documents linked to the search (e.g., leave-taking service (rector and interim), installation of search committee, discernment retreats, and welcoming/installation of rector) should be forwarded to the parish archives.

Appendix V: Farewell Liturgy for Interim Minister

Following the post-communion prayer, the Interim Priest kneels at the communion rail. All come forward to lay hands on him/her, or on the shoulder of the person in front of you.

When all are in place, **the Senior Warden says:**

N., you have been among us as priest through the period of our search for a new Rector. You have been a faithful steward to us in bringing God's word and sacraments, in tending to our spiritual needs through prayer and teaching, and in your pastoral leadership of this parish.

The Junior Warden continues:

We give thanks to God for your presence among us and pray for God's abundant blessings upon you as you go forth from here in your continued ministry to Christ and the Church.

The Senior Warden asks the congregation:

My sisters and brothers, do you recognize and accept the conclusion of this pastoral relationship?

People:

We do.

Priest:

Let us pray. O God, you have bound us together for a time as clergy and people to work for the advancement of your kingdom in this place. We give you humble and hearty thanks for the ministry that we have shared in the time now past. We thank you for your never-failing presence with us through these years, and for the deeper knowledge of you and of each other, which we have attained. We thank you for those who have been joined to this part of Christ's family through baptism. We thank you for opening our hearts and minds again and again to your Word, and for feeding us abundantly with the Sacrament of the Body and Blood of your Son.

People:

Gracious God, be with N. as he/she leaves; grant that all of us, by drawing ever nearer to you, may always be close to each other in the communion of your saints. All this we ask for the sake of Jesus Christ, your Son, our Lord. Amen.

The Departing Interim gives the final blessing

Appendix W: Welcoming the New Rector

- Have the Rector's office cleaned, including the drapes and carpet where appropriate
- If there is a closet, see that it is emptied, cleaned out, and has some hangers
- If there is a storage closet, have it cleaned out
- Have desks, shelves and cupboards emptied and wiped down, and windows and windowsills washed
- Have a set of keys ready that will include a master key, keys to the main office, staff offices and the sacristy
- Prepare a folder that includes the following information:
 - Current membership list and the most recent pictorial directory if there is one
 - A roster of Vestry members
 - A copy of the budget and minutes of the last three Vestry meetings
 - A directory of ministries, if there is one
 - Letters of agreement for current staff members
 - A schedule and list of the duties of office volunteers
 - A copy of any policies, procedures, or personnel guidelines
 - A copy of the diocesan canons
 - The last two or three issues of the parish newsletter, diocesan news, weekly news bulletin, and Sunday service leaflet
 - A roster of active committees
 - A map of the area
 - If there are guilds for men or women or other groups that meet regularly, provide a description of their activities and meeting schedule and their expectations of the rector
 - A calendar with key dates marked of upcoming parish events and what is expected of the rector
 - Assemble any passwords the rector will need such as those to a computer, security system or special accounts
 - Any liturgical customary or instruction manual for Eucharistic visitors, acolytes, altar guild, chalice bearers, lectors and intercessors along with current Sunday schedules
- Offer to provide a tour of the building
- Offer to arrange lunch with a neighboring clergy or the convener who can provide information on the Deanery, clergy meetings, Diocesan Convention dates, clergy dates and other ecclesiastical matters