



# A Guide for Congregations in Transition

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## The Episcopal Diocese of Long Island

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*Almighty and gracious 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.*

### Guidance Prayer for New Ministry

*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.*

Book of Common Prayer, page 818

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*With thanks to Canon Gregory Jacobs and the Diocese of Newark for allowing us to adapt their Guide for Congregations in Transition.*



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## Introductory Remarks

Every living being in God's creation experiences transition on a consistent and continual basis. We human beings are not exempt from the joys and struggles of transition. Our lives are filled with transitions big and small be it the commute from home to work, a move to a new town, the day we embrace a new job, or the moment we bid farewell to a beloved friend.

God is in the midst of all of our transitions, leading us from the wilderness of hope to the joy of the Promised Land. In the midst of our transitions God provides us "food enough," giving us everything we need and then some.

Church Communities are not by any means 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 the midst of your congregation as you enter this transition, providing you "food enough" and everything you need to faithfully enter this process.

Your Diocesan Bishop is with you on this journey, providing you the support, encouragement and guidance you need at this time. The Diocesan Transition Minister serves as the Bishop's liaison to your congregation and pledges to provide you the consultation and resources needed to transition successfully into the next stage of your congregation's life. Two-way 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.

There is always a measure of uncertainty 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. Our 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.



## **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, 4-6 months is appropriate in order to encourage a thoughtful transition. The clergy and wardens will jointly determine how the congregation will be informed of the priest's departure.

### **❖ Clergy Exit Interview**

The departing priest must make an appointment to meet with the bishop to discuss the state of the congregation, as well as their options in the upcoming transition period. A **"Clergy Exit Interview" (Appendix CC)** to be shared with the Bishop, Transition Minister and his or her successors is completed.

### **❖ Notifying the Congregation**

Once contact has been made with the Bishop's Office, the priest must immediately notify the wardens and soon after the entire vestry. Together the departing cleric and the vestry announce to the parish, generally in the form of a letter and a personal announcement in church.

### **❖ Transition Team**

The period immediately following the announcement of the clergy's departure can be a time of anxiety for a congregation. Strong communication and clear systems for working together generally reduces anxiety and increases 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 steering 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. **See: "Responsibilities of a Transition Team" (Appendix B).**



### ❖ **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, "Liturgy for the Ending of a Pastoral Relationship" (Appendix D), and "To the Laity: Saying Goodbye Well" (Appendix E).**

### ❖ **Leaving-taking and Boundaries for departing Clergy**

Appropriate Pastoral Boundaries must be set when a cleric departs a congregation. It is the Bishop's expectation that that once a clergyperson leaves a congregation, he or she will bring closure to pastoral relationships with members of that congregation. The health of the congregation is dependent upon how well the transition is managed. Former parishioners should understand from the clergy in a positive and affirming way that it is not appropriate to continue a pastoral relationship.

The Bishop expects that the clergyperson will accept no further requests from members and former members of the congregation to provide pastoral services at weddings, funerals, baptisms, or any other occasion of public worship for at least one year. After one year, clergy may accept invitations from the interim or rector, but may not solicit such invitations or accept them from former parishioners.

When a former parishioner reaches out to a departed clergyperson for pastoral care or to officiate at a sacramental liturgy, the clergyperson is obligated to pastorally redirect the former parishioner to their current interim or rector. At the rector's invitation alone may the former cleric officiate at pastoral services in his or her former congregation.

There are many details to wrap up when cleric departs a congregation. **"Leave-taking Essentials" (Appendix C)** has been provided for clergy and will aide a through, professional and pastoral ending to the pastoral relationship.

### ❖ **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 the 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 retirement, they are agreeing to a friendly severance arrangement with their clergy. The relationship has ended (severed) but an arrangement for additional salary and benefits is made under friendly circumstances.

Severance arrangements are rare and generally not encouraged. A vestry considering such an arrangement must consider the following: 1) Clerics cannot “bank” unused sabbatical time. Sabbaticals must be taken during active ministry. 2) A severance arrangement has the potential of causing financial hardship, placing the parish in a holding pattern, making it difficult to call an interim or even to cover the costs of supply clergy. 3) There can be potential for confusion regarding the end of the cleric’s ministry -- “Has the priest moved on or is he lingering on behind the scenes?” 4) Finally, over the course of the cleric’s relationship with the church, payments of 18% of the cleric’s salary and benefits have been paid on behalf of the cleric into the Church Pension Fund. Upon retirement, the Church Pension Fund provides significant benefits including pension payments, extended health benefits, life insurance, and a 20K relocation benefit.

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 not 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.

#### ❖ **Initial Meeting with Vestry and Transition Minister**

After the priest has announced his or her departure, the Diocesan Transition Minister will make immediate contact with the wardens and generally meet with the vestry as soon as it is possible. The purpose of this meeting is to aide the lay leadership in assuming their formal canonical roles in the absence of a priest and to make provisions for a thoughtful transition, including the process of identifying short term (supply) and long-term (Interim) clergy to aid the parish in the transition. **See, “Parish Request for Interim Clergy,” (Appendix F).** The Diocesan Transition Minister will also explain the various search options and share with the vestry (and/or congregation) an overview of



the search process. A more detailed formal discussion about the search happens after the priest has departed the parish.

### ❖ **Provision for Clergy Leadership During the Transition**

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

**See: "Responsibilities of a Transition Team" (Appendix B).**

Pursuant to the canons of the National 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 appoint either an Interim Priest trained in interim ministry or a Priest-in-Charge.

An **Interim** comes to a healthy stable parish that is ready to call a rector. The Interim is a shaman and guide to the vestry and parish during the transition encouraging momentum and helping to prepare the soil for arrival of the new permanent rector.

**See, "The Interim Priest Program in the Diocese of Long Island" (Appendix G).** The interim is generally approved by the vestry and appointed by the bishop. The interim remains on for approximately 12-18 months and may not be considered a candidate for rector.

In some circumstances, the Bishop appoints a **Priest-in-Charge (PIC)**. This generally happens when the parish is under some sort of strain. A Priest-in-Charge may be the appropriate decision when:

- there has been a long-term rector
- the rector has left after a very short tenure
- the rector-vestry have been canonically separated
- there are meaningful financial difficulties
- there is extreme unresolved conflict in the congregation
- there are urgent and intractable facility challenges
- the vestry has requested a PIC



Under some circumstances, the Bishop may identify and appoint a PIC to serve the parish. However, generally, candidate/s is/are approved by the vestry and appointed by the bishop. In this case, the PIC may stand for rector. The PIC has all the authority of rector except tenure. See **“The Priest-In-Charge Program of the Diocese of Long Island” (Appendix H).**

In the days immediately following the departure of a priest, the wardens may need to arrange for **supply clergy**. A list of supply clergy may be obtained from the Bishop’s Office.



## **PHASE II: Focusing the Search**

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 (not the best priest) 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.

### **❖ Meeting with Diocesan Transition Minister**

The Diocesan Transition Minister (who in this Diocese is the Canon for Ministry Support) will celebrate and preach at a liturgy very shortly following the departure of the former cleric. A meeting following the liturgy (or at another time, as appropriate) with the Vestry will focus on settling in the Interim, any particular interim work (i.e. improvements to the rectory, congregational/leadership development and the nature and timeline of the search process. If the parish is going to work with a search consultant, a name will be provided at this meeting. 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.

### **❖ Diocesan Requirements For Conducting A Clergy Search**

In the Episcopal Church, clergy may be placed only with the approval of the Bishop Diocesan. The Bishop Diocesan determines eligibility for transition ministry in the Diocese of Long Island. It is based upon the clergy's qualifications. No clergy is eligible to be called as rector or vicar in the church he or she currently serves.

**Non-Discrimination Rule:** All searches in the Diocese of Long Island 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.



The Bishop is eager to have qualified clergy from within the Diocese be given serious consideration by congregations in search. Any priest in the Diocese who meets the qualifications of the position should be given the benefit of at least a phone interview.

**Curates/Assistants** - A rector may not recruit or hire a seminarian, deacon, or a curate without the Bishop's permission. The Bishop must give approval for a rector to consider recruiting or hiring a curate from outside the Diocese of Long Island. A curate must be willing to release a full canonical file.

#### ❖ **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 substantial invasion of investments/endowments
- Past and prior year audits performed and filed with the Diocese
- Timely and complete submission of congregations' parochial report
- Submission of diocesan pledge card and current and regular payment of diocesan pledge of 10%.
- Congregation has no debt or has a viable debt repayment plan

#### ❖ **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. **See "Minimum Compensation" (Appendix A).** Some handles for considering an appropriate compensation may include:

- The compensation of the outgoing rector
- The compensation packages of rectors of similar parishes
- The nature and scale of the work expectations of the rector



## ❖ Search Options

**An abbreviated search with “short list”** --After the parish completes its self-study, the Bishop’s Office, submits the names of a pre-determined number of candidates (3-5) for the search committee to consider, thus eliminating the steps of sorting through the papers of many prospective candidates. It is the task of the Bishop’s Office in this instance to carry out the extensive groundwork of narrowing the field, and that process, done carefully and sensitively, takes time.

Upon reception of the list, the search committee conducts its work as it would normally, in reviewing and—as required with a short list—interviewing the candidates. If a rector is not called as a result of the discernment process, the congregation may ask for more names or choose one of the other search options.

**Traditional Search** - Depending upon the particular circumstances of each parish, a search may be from 9-16 months long. 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. A Search Consultant can be useful in setting up a realistic timeline designed to achieve a balance between efficiency and a pace that encourages thoughtful discernment, caution and thoroughness. **See, “Transition Process Timeline” (Appendix I).**

## ❖ Search Consultant (list maintained by the Bishop’s Office)

A consultant/facilitator experienced in clergy searches is offered to any parish in search. The Search Consultant is engaged by the Vestry but is accountable to the Bishop’s Office for the search process. The Search Consultant works both with the Vestry and the Search Committee, helping them to plan and design congregational meetings and focus groups, gather and interpret data, and develop questions and a design for the interview process. The Search Consultant serves as the link with the Bishop’s Office in providing resources and guidance to the congregation during the self-study period and search process and works collaboratively with the Interim.

E-mail communications concerning the search process between the Interim and the Search Consultant should be “cc’d” to the Transition Officer in the Bishop’s Office, and the Interim and Search Consultant should determine a system for being in touch. The greater the communication among all parties, the greater the opportunity for a smooth transition period.



The congregation is responsible for the fees paid to the consultant and should make an arrangement with the consultant for regular payment. If the cost of a consultant will place an undue burden on the congregation, the Senior Warden is encouraged to contact the Bishop's Office.



## **Phase III: Self-Study and Development of Parish Profile and Webpage**

### **❖ Initial Vestry Meeting with Search Consultant**

The Search Consultant will facilitate an initial meeting with the Vestry. It is here that the Vestry and the Search Consultant begin to negotiate the terms of their relationship, which can include only the portion pertaining to parish self-study and the development of the Parish Profile webpage or the entire search. This is an important meeting for focusing the work that lies ahead. The Consultant will charge the vestry with the task of identifying and commissioning 2-3 people who will eventually become the “Writing Committee” or the “Profile Committee.” They must include both members of the Search Committee and the Vestry.

### **❖ Vestry Retreat with Search Consultant**

The Search Consultant conducts a Leadership in Transition retreat with the vestry using the principles of **Appreciative Inquiry**. The members of the Writing Committee are also asked to participate in the retreat. The purpose of the retreat is to help the leadership of the congregation develop awareness for the essential strengths, gifts and blessings of the parish and any concerns, deficits and challenges. The Consultant will help the Vestry to identify the values of the parish and what they believe is God’s preferred future for the congregation. This vestry retreat will help lay the important foundation for the upcoming Parish Event/Parish Summit.

### **❖ Parish Appreciative Inquiry**

The Search Consultant using Appreciative Inquiry will facilitate an event with the wider parish (could be on a Saturday morning, or Sunday after Church, an event with food, a focus on community, celebration and hope). The work is not dissimilar to what the Search Consultant did at the Vestry Retreat. During the event, the Search Consultant will help the parish engage the following:

- 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 brochure.



## ❖ Preparing Your Parish Search Webpage

Following the vestry retreat and the parish event, the Writing Committee will prepare a parish website search page. This product is the “story” of the parish. that briefly describes the personality, mission and ministry of the congregation, but focuses on the uniqueness of the parish and the passions and gifts for ministry it is seeking in its next priest. The text is drawn from parish meetings, survey results, the Neighborhood Prayer Walk, (see Appendix and other parish sources. It is highly suggested that photos be taken of the current congregation engaged in various activities that are important to the parish faith and life to be included on the webpage.

The webpage must clearly outline the compensation/benefits package that has been approved by the vestry for the position.

**The completed webpage must be reviewed by the Diocesan Transition Minister before going live.** Examples of parish webpage profiles from past searches are available from the Bishop’s Office.

The description of the congregation contained in the parish profile 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 Webpage Outline” (Appendix N).**

## ❖ Preparing Your Congregational OTM Portfolio

In addition to the parish brochure, the vestry and designated allies (could be members of the writing committee or search committee) must prepare the congregation’s OTM Portfolio. OTM stands for *The Office for Transition Ministry*, a ministry of the National 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.

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 former rectors and the compensation offered for the new position. Your Portfolio will help us to identify qualities candidates who you will want to invite into your search process. This is not the only tool for calling clergy but it is helpful. **See, “OTM Portfolio Template” (Appendix O).**



### ❖ A Prayer for our Search Process

A Parish Search Prayer may also be developed for the whole congregation that invites a spirit of thoughtfulness, collaboration, and faith-building. Many committees ask that the Interim or one member of the committee act as their “chaplain” to 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: COMMISSIONING A SEARCH COMMITTEE**

### ❖ Search Committee

Once the Vestry and Parish have met with the Search Consultant and the development of a Parish Profile has begun, it is time for the Vestry to depute a Search Committee.

A good target number for the Search Committee is 8-10 members (9 is best).

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.** On the whole, the Vestry should attempt to select people who are spiritually sturdy, prayerful, with open hearts and minds who will be discerning of the culture and dreams of the congregation as a whole. Also, candidates must be people who have time to dedicate to the search process and with proven capacity to execute. One Vestry person should serve on the Search Committee to be a liaison with the Vestry during the Search.

It should not go without saying that openly disaffected persons or those with an axe to grind are not helpful to a search committee, nor is it appropriate for a member of the parish staff to serve on a search committee. **Family members of vestry members do not serve on the Search Committee.**

### ❖ 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. **“Sample Charge from the Vestry to the Search Committee” (Appendix L).**



## ❖ **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 M).**

## **PHASE V: The Search Process**

### ❖ **Confidentiality**

It is essential at the outset of this part of the process that the Search Committee and Vestry commit themselves to discretion and confidentiality. 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 search process.

Both Search Committee members and Vestry members must understand that generally, prospective candidates have not yet informed their own congregations that they may be in search. Equally important is to provide for the security of search committee files throughout the process. **See, “Transition/Interim Communications” (Appendix Q).**

### ❖ **Communication**

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

### ❖ **Receiving Names and Moving the Search**

At this point your congregation is said to be “Receiving Names” and begins accepting applications from interested priests. Your Parish Profile is complete and posted on your vibrant and up-to-date Parish Website. Your OTM Portfolio is live, indicating to the clergy of the wider church that your parish is “receiving names.” Our Diocesan Website with a direct link to your website is also indicating your parish is “receiving names.”

For a traditional Rector’s Search, applicants will be sending materials directly to the chair of the search committee. However, they will also cc’ their materials to the Canon for Ministry Support/Transition Minister.



The Search Committee normally receives names from the following sources:

- Candidates themselves, who submit their applications directly to the congregation
- Candidates recommended by parishioners
- Candidates recommended by the Office of the Bishop
- Names received by the Diocesan Transition Minister through other Diocesan Transition Ministers at the bi-annual Transition Ministry Conference (March and September) and registering in Open Congregations here: <https://www.transitionministryconference.org>
- Advertising on Episcopal News Service: [www.episcopaldigitalnetwork.com/postnewjob](http://www.episcopaldigitalnetwork.com/postnewjob)

Note: No clergy is eligible to be called as rector or vicar in the church he or she currently serves.

#### ❖ **Narrowing the Field of Candidates**

Once the period for receiving names has passed, (generally 6-8 weeks) 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 fewer and fewer applications and to create a **"working list"** of 10 to 12 serious candidates. **Eliminating candidates on the basis of the clergy OTM Portfolio alone is not a recommended practice** unless it is clear from a close reading that the candidate is unsuitable.

At the outset, the supporting materials, such as the candidates' resumes, clergy profiles, and their response to short (no more than 2), well-written questions crafted by the committee members, help acquaint them with the potential priest and the gifts for ministry that he/she will offer to the congregation. A search consultant's guidance is beneficial to following a process that is both thorough and faithful.

**Once the search committee has developed the "working list", it should be submitted to the Bishop's Office along with the names and the dioceses in which the candidates are canonically resident. By reviewing the list of priests being considered, and conducting a preliminary Transition Minister check, the Bishop's Office is alerted to any issues that might prevent a priest from being considered for deployment.**

At the same time, 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 search committee proceeds to screen its working list of candidates by various methods, including, soliciting sermons for the committee to hear or read, reviewing references, and conducting telephone interviews. This will further narrow the scope of the search.



Once the list is reduced to 3 - 5 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 P).** 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 (i.e. schools, 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.

#### ❖ **On-site Visitations and “Tripwires”**

In times past, search committees visited candidates in their current assignments. For a number of reasons this is no longer considered a best practice. 1) 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. 2) There is potential for search representatives to become distracted by the dynamics of the parish that they are visiting, losing focus on the candidate. 3) The context of each parish will differ (some will be in large vibrant parishes, others small and some between calls).

It is now considered a best practice to bring each of the candidates to your parish as it levels the “playing field.” The “level playing field” also makes it possible for all the members of the committee to participate. Each candidate may celebrate and preach at your church for members of the search committee only.

#### ❖ **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 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 will also contact their respective counterpart in the dioceses in which the finalists 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 whom it wishes to recommend as the next rector of the congregation, the name/s is/are presented to the vestry for consideration and a vote of approval. Depending on the process to which the vestry has earlier agreed through its charge to the search committee, exposure to the candidate(s) by the Vestry varies. Normally, the search committee will present a final report to the vestry outlining how the gifts for ministry match the parish goals. **See, "Sample Handoff Memo from Search Committee to Vestry" (Appendix S).**

A typical visit would include an opportunity for the candidate to celebrate Holy Eucharist and preach 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 Ministry Covenant and to answer any questions the candidate may have about the parish. **Please see "Ministry Covenant" (Appendix U).** 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 stages 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 high cost of living (especially housing) in New York. **See, "Ground Rules for Finalists' Visits to Parish" (Appendix T).**

### **❖ Oxford Document Background Check**

While 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 Long Island. All finalists must have a complete background check. 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 Bishops' 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 Long Island or for Province II. In such cases, the results may be transferred or updated, for a cost of \$45. The cost of a full background check is \$175.

#### ❖ **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 the Diocese of Long Island and to establish a relationship with the Bishop of the Diocese. 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's will provide his council to the vestry prior to its discernment 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 the Rector**

Once the bishop has provided his council 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 V).** 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 may not happen until the Ministry Covenant (see below) has been signed by all parties.**

#### ❖ **The Ministry Covenant**

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 Ministry Covenant that is concluded between the parish and the clergy person who has been called.



The Ministry Covenant 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 a Ministry Covenant, is available. **Please see "Sample Rector Ministry Covenant", (Appendix U).**

#### ❖ **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 W).** Feedback from the search consultant on the experience of the search process and any aspect of it is usually welcomed by the search committee. 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 or her good-bye merits the attention of the congregation at the end of the transition period. **See, Appendix W, "Sample Farewell Liturgy to Interim"** The Bishop's Office also encourages an exit interview with the departing Interim Priest.

### **PHASE VII: Preparing For the New Clergy**

#### ❖ **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 Y and Z).** 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 "good-byes", 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 officiate and preach at this service. If, however, given his schedule, this is not possible, the local dean or archdeacon 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 a significant accomplishment but hopefully, it is not the only benefit a parish has received from its involvement in the interim process. Much of a parish's involvement and benefit depends upon the extent and enthusiasm of 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.



**INDEX OF APPENDICES**

**Appendix A: PARISH FINANCIAL DATA**

Total Budget: \$ \_\_\_\_\_ Total Debt: \$ \_\_\_\_\_

Total Pledge Paid to Diocese: \$ \_\_\_\_\_/year

Diocesan Aid Received: \$ \_\_\_\_\_ Total Pledges: # \_\_\_\_\_ \$ \_\_\_\_\_

Pledge Payment Current? \_\_\_\_\_ Audit Done? \_\_\_\_\_

Please submit prior year and present annual budgets and two most recent monthly financial statements.

*COMPENSATION*

Total Clergy Compensation (See Diocesan Clergy Compensation Guidelines) \_\_\_\_\_

Housing: o Supplied o Cash Allowance Housing Supplied For: \_\_\_\_ Persons

*BENEFITS / PROFESSIONAL EXPENSES*

Health Insurance: \$ \_\_\_\_\_ Clergy Pension: \$ \_\_\_\_\_

Car/Travel Allowance: \$ \_\_\_\_\_/year

Continuing Ed. Allowance: \$ \_\_\_\_\_/year #weeks/year: \_\_\_\_\_ Vacation: \_\_\_\_\_ weeks/year

Other Expenses: \$ \_\_\_\_\_/year Housing Equity \_\_\_\_\_%



## DESCRIPTION OF PARISH

Mission/Ministry Areas to Address during Transition

1: \_\_\_\_\_

2: \_\_\_\_\_

3: \_\_\_\_\_

4: \_\_\_\_\_

*Please submit copy of parish mission/ministry plan and/or Mutual Ministry Review if available*



What Are the Primary Concerns of the Congregation?

PREVIOUS INCUMBENTS OF THIS POSITION

Name of Last Incumbent \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_

Next to Last Incumbent \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_

SPECIAL CONSIDERATIONS (*Languages, specialized training, etc.*)



## Appendix B: Responsibilities of Transition Team

The Transition Team, created by the Vestry at the time of the announcement of a clergy's upcoming departure, particularly when there may be a longer than average period of time between announcement and departure, serves primarily to oversee the over-all 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 the 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 "high 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 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 might 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 peoples' homes, showing the new rector where the stores, schools and medical services may be found. ***See Appendix X, "To Welcome the New Rector".***
- In some cases, to work with the interim in guiding the parish's work on the "Six Developmental Tasks."
- Undertake other transition-related tasks from time to time as may seem appropriate.



## **APPENDIX C: 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, good 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.*

### **Leave-taking Essentials**

Inform the Bishop in writing of your leaving and the date of your last service.

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.

The canons require the wardens to notify the Bishop in writing that the parish is without a priest.

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.

With the vestry, clarify the terms of any unused leave or vacation time, plans for continuing contributions into the Church Pension Fund, and arrangements for insurance coverage.

Notify the Church Pension Fund, securing the proper forms, if you are retiring. The Bishop's signed approval is required for retirement.

Plan a ritual ending of your pastoral relationship within the context of worship. Refer to the Book of Occasional Services for suggestions.

Plan an ending with parish organizations and staff.



### **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.

### **Preparing To Go**

Schedule an exit interview with the Canon for Congregational Support and a mutual review of ministry with the vestry and parish leaders.

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 home bound, 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 preplanned 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, copies of budgets for three years, and by laws.

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.

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 e-mail 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 take out.

Create a contact list of parish leadership, including roles and e-mail addresses.

Turn in your keys, clearly tagged.

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

Encourage and emphasize hospitality for welcoming new clergy and their loved ones.

Let people say good bye, 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, e-mail, 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

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

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

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

*With gratitude to the Rev. Thomas Orso, Canon for Deployment for the Episcopal Diocese of New York for sharing this amazing and thorough pastoral checklist.*

### **APPENDIX CC: The Rector's Exit Interview**

The purpose the exit interview 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 Office and is generally facilitated by the Canon for Ministry Support shortly after the cleric has determined that he or she will be leaving the parish.

#### **Suggested Questions:**

##### **Parish Life**

*Please provide the current annual report, a copy of the budget and a Sunday bulletin for the exit interview.*

- ❖ Describe the five greatest strengths of the parish.
- ❖ Describe the five greatest/most urgent concerns or weaknesses.
- ❖ 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 congregation?
- ❖ How are you participating in God's mission of restoration and reconciliation? (Describe how the parish relates directly to the community in which it is located.)
- ❖ What is your pledge level to the support of our Diocesan Ministry Plan?
- ❖ 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?

### **Parish Policy**

*Please provide written policies or a policy manual, if available, for the exit interview.*

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

### **Staff, Volunteers, Lay Ministers and Lay Leaders**

*Please provide any personnel policies and job descriptions for the exit interview.*

- ❖ 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 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-in?
- ❖ 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 would 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: Liturgy for the Ending of a Pastoral Relationship**

*From the Book of Occasional Services*

*Departing Minister:*

On the \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_, I was inducted as rector of \_\_\_\_\_, \_\_\_\_\_, New York. 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 which 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 works; 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::*

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 which we have shared.

Silence

We thank you for your patience with us despite our blindness and slowness of heart. We thank you for your forgiveness and mercy.

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 whose spirits live with you in eternity.

Silence

Now, we pray, be with those who leave and with us who stay; and grant that all of us, 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



## APPENDIX E: 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
  - \*And to 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.
- 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.
- As usual, 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 F: Parish Request for an Interim Priest

Date: \_\_\_\_\_

### GENERAL INFORMATION

Position Title: \_\_\_\_\_ Date Position Is Open: \_\_\_\_\_

Parish/Mission: \_\_\_\_\_ Street Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_ Tel.: \_\_\_\_\_ / \_\_\_\_\_

Contact Name: \_\_\_\_\_ Tel.: \_\_\_\_\_ / \_\_\_\_\_

Email Address \_\_\_\_\_

Parish Website: \_\_\_\_\_

Type of Community:    Rural    Town    Suburban    Urban  
Type of Parish:    Single Congregation    Yoked    Cluster    Ecumenical (*e.g. ELCA*)

Communicants # \_\_\_\_\_ Sunday Services # \_\_\_\_\_ Avg. Total Sun. Attendance # \_\_\_\_\_

Type of Position: Full Time\_\_ Part Time\_\_ Interim\_\_ Priest-in-Charge\_\_ Supply\_\_

Number of Hours \_\_\_\_\_ per week (40 hrs. /week = Full Time)

Start Date \_\_\_\_\_ Approximate End Date \_\_\_\_\_

Financial package approved by the vestry attached \_\_\_\_\_

(nb. 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).



## **APPENDIX G: Interim Priest in Charge Program in the Diocese of Long Island**

**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 in Charge**

- The Bishop through the Diocesan Transition Minister will identify a suitable Interim Priest from among qualified local candidates or recruit qualified “external” candidates for the position.
- 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 Ministry Covenant (cf. Appendix GG) setting forth the mutual obligations and responsibilities of the Interim and the vestry is negotiated. The appointment is official upon the approval of the covenant 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 Focus 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 Committee, the Search Committee, the Search Consultant and other consultants as mutually agreed, to prepare for healthy transition to the next rectorship. 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 which 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, baptisms), calling upon the sick and shut-in, 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 any consultant in the calling process, but shall not work with the Search Committee as they solicit and screen candidates. The Interim shall not be eligible to be a candidate for Rector.

**The Interim Priest shall not under any circumstances be eligible to be a candidate for Rector.**

Monthly reports by the Interim Priest may be required and attendance at meetings of the Interim's Group are expected by the Bishop.



## APPENDIX GG: Sample Ministry Covenant for Interim Priest in Charge

### Ministry Covenant

Between

The Wardens and Vestry of \_\_\_\_\_

And

The Reverend \_\_\_\_\_

who has been appointed Interim with the understanding that his/her tenure shall continue for twelve to sixteen months or until shortly before the arrival of the new Rector, unless earlier dissolved by mutual consent or upon sixty days' notice of either party.

#### PREAMBLE

The Reverend \_\_\_\_\_ (“the Interim”) shall lead \_\_\_\_\_ Church (“the Parish”) as pastor, priest and teacher, sharing in the councils of this congregation and of the whole Church, in communion with our Bishop. By word and action, informed at all times by the Holy Scriptures, the Book of Common Prayer, and the Constitution and Canons of the General Convention and our Diocese, the Interim shall proclaim the Gospel, love and serve Christ's people, nourish them, and strengthen them to glorify God in this life and in the life to come.

#### Themes and Focus 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 Committee, the Search Committee, the Search Consultant and other consultants as mutually agreed, to prepare for healthy transition to the next rectorship. Specific themes and focus points to be addressed include:

**Heritage:** *Reviewing how the congregation has been shaped and formed.* The congregation's heritage, both corporate and individual, is the foundation upon which the present rests. Paying attention to heritage means encouraging and hearing all of the stories about the congregation's past, and embracing the rich variety of story that makes up this particular congregation. It includes coming to terms with the history of this congregation and its relationships with previous clergy and considering what peace might still need to be made with the past.

**Leadership:** *Reviewing the membership needs and its ways of organizing and developing new and effective leadership.* Dealing with shifts in leadership roles that naturally evolve in times of transition allows new leaders to come to the fore constructively, and provides opportunity to integrate potential new leaders of the Church with those who have previously borne this



responsibility. The interim period also provides opportunities for individuals and various congregational organizations to examine types of leadership needed. As new leaders emerge, some seasoned leaders may re-commit or may decide to refocus their gifts.

**Connections:** *Discovering all the relationships a faith community builds outside of itself.* Renewing and reworking relationships with the diocese helps each to be a more effective resource and support to the other. Sometimes congregational life is so busy that congregations and their leaders forget to attend to their connections both to their denomination and to the network of communities around them. The interim period is an appropriate time to reassess old links and to consider new ones, especially those within local communities.

**Mission:** *Defining and redefining sense of purpose and direction.* Discovering the congregation's special identity evokes dreams of being and doing apart from previous clergy leadership. The primary work in this area involves clarifying the faith community's identity and core values, working to develop mission and vision statements, and perhaps even working out short-term tactical plans.

**Future:** *Developing congregational and pastoral profiles.* Building and developing commitment to the leadership of the new rector is critical for preparing to move into the future with openness to new possibilities of joint mission and ministry. Focusing on the future requires a healthy and honest assessment of the other themes or focus points, so that the congregation can turn its energy toward proactive decision-making in the present and for the future.

The Interim offers the congregation a rich variety of possibilities to engage these five themes or focus points. Knowing that each situation is unique, the Interim strives to discern the tools that are most appropriate for the specific situation. Reflecting upon the five themes or focus points helps a congregation to answer the questions, "Who are we?" "Who are our neighbors?" and "What is God calling us to do?"

### **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 which is the Bishop's pastoral and canonical responsibility for congregations in leadership transition. The Interim shall lead Parish 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, baptisms), calling upon the sick and shut-in, 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 any consultant in the calling process, but shall not work with the Search Committee as they solicit and screen candidates. The Interim shall not be eligible to be a candidate for Rector.

#### **SECTION A - TIMES OF WORK AND LEAVE**

▪ The Interim's work includes not only activities directed to the parish and its wellbeing, but also labors on behalf of the Diocese and community. The Interim's scheduled workweek, in addition to Sunday worship, is five (5) days, usually measured as ten to twelve units of mornings, afternoons, or evenings in various combinations reflecting the demands of this ministry. In general, no more than three (3) evenings per week are expected. The Interim is expected to preserve at least one continuous twenty-four hour period each week solely for personal and family use. All clergy are required to attend:

- a) Diocesan Clergy Days
- b) Deanery Clericus Meetings
- c) Chrism Mass

▪ The Interim will have the following periods of leave at full compensation:

- a) National Holidays, to be taken so as not to interfere with worship on major occasions
  - Four weeks annual vacation, including five Sundays
  - The weekdays following Christmas and Easter
  - One week annually for spiritual retreat
  - Six days per year for continuing education (in addition to vacation)



## SECTION B – COMPENSATION

The Interim's cash salary will be \$ [REDACTED] per year to be paid bi-weekly. This salary will be reviewed in January of each year, and may be adjusted for cost of living increases based upon the action of the Diocesan Convention concerning base diocesan minimum compensation. During the term of this agreement, Parish shall pay any other expenses related to the Interim's cure at Parish, including workmen's compensation required by New York State Law. (n.b. New York State Unemployment Insurance Law excludes any clergy, in the exercise of their ministry, from collecting unemployment insurance).

The Interim shall receive a cash housing allowance which includes utilities in the amount equal to 50% of the cash stipend **OR** The Interim shall have full use of the Rectory as a personal residence. Expenses connected with the Rectory shall be handled as follows:

- a. Utilities shall be contracted for and paid by the parish.
- b. Care and maintenance of the Rectory grounds are at the parish's expense.
- c. To ensure proper maintenance and care of the Rectory, there will be an annual walk-through of the house and grounds by the Wardens and Interim.

**(depending on housing provided)** In accordance with Diocesan Policy a housing equity account shall be established using the Retirement Saving Plan (R.S.V.P) into which an amount of 3% of total compensation as defined by the Church Pension Fund shall be deposited.

As additional compensation, the Interim shall receive a sum equal to 50% of the annual self-employment Social Security Tax.

Parish will make the appropriate contributions to the Church Pension fund on behalf of the Interim. The Church Pension Fund provides the formula used in determining this contribution. Per the current assessable compensation for the Interim, the annual pension contribution will be \$ [REDACTED] **(Bishop's Office will determine)**. The parish will be billed monthly from Church Pension Fund. Every time a component of the formula changes (salary, utility expenses, housing arrangements, etc.), the annual pension contribution will also change.

Parish will provide and pay 100% of the premiums for adequate medical and dental insurance through the Episcopal Church Medical Trust for the Interim **(and their spouse?)**. Due to the densely populated networks in our area, the Diocese has determined adequate coverage to be the Anthem BCBS BlueCard PPO 90 and Anthem BCBS CDHP 20/HSA for medical and the Aetna DMO for dental.

Parish will provide Group Life and Accidental Death and Dismemberment Insurance, equivalent to or better than the group plan provided through the Diocese.



The Diocese will provide Continuing Education training at the Mercer School of Theology, up to a \$2,000 value. The Parish will provide a minimum of \$750 per year for additional Continuing Education costs.

### **SECTION C – EXPENSES**

Parish will pay the following business expenses incurred by the Interim in fulfilling the duties of the office:

Reimbursement for the use of a personal automobile for Church Business at the rate of 54.5 cents per mile or such other amount as the IRS may prescribe for the business use of a privately-owned vehicle, and any other transportation expenses incurred while on church business, in accordance with IRS criteria and the Manual of Business Methods in Church Affairs.

The normal expenses of the church's office operation, such as telephone, postage, office equipment, supplies, secretarial services, books and periodicals, as well as usual and customary expenses incurred in carrying out pastoral duties.

### **SECTION D – SUPPLEMENTARY COMPENSATION**

The Interim shall not charge fees for performing any rites of the Church (i.e.: Baptisms, Marriages and Funerals) for members of Parish. However, the Interim may receive income from other sources, such as Sacramental services on behalf of persons not in any way related to Parish; fees and honoraria for professional services performed on personal time for groups unrelated to Parish; or for sermons, books or articles published outside the parish.

### **SECTION E – ALMONERS FUND (Discretionary Fund)**

The parish will provide \$ [REDACTED] from the operating budget each year for an Almoners Fund to be dispersed by the Interim. The Almoners Fund is an account of the parish. It may be kept in a separate account in the name of the church (i.e. "Parish: Interim's Almoners Fund").

### **SECTION F - USE OF BUILDINGS**

It is understood that the general pattern of building use followed during the last Rectorship shall be maintained, unless there is specific action of the Vestry to the contrary. The Interim shall have the right to grant use of the buildings to individuals or groups from outside the parish, only under guidelines approved by the Vestry.

### **SECTION G - MUTUAL STUDY OF MINISTRY**

There shall be a discussion and mutual study of the total ministry of the parish after 4-6 months, in order to:

- Provide the Interim, Wardens and Vestry opportunity to assess how well they are fulfilling their responsibilities to each other and to the ministry they share.
- Establish and adjust goals for the work of the parish during the interim.



- Plan healthy closure for the interim ministry and prepare for the coming of the next Rector.
- Isolate areas of conflict or disappointment which have not received adequate attention and may be adversely affecting mutual ministry.
- Clarify expectations of all parties to help put any future conflicts in manageable form.
- The Interim Consultant will facilitate the Mutual Study of Ministry.

**SECTION H – REVISION**

This letter may be revised only by mutual agreement at the time of the annual mutual study of ministry, except that revisions of compensation and expenses may be mutually agreed upon in a separate budget process.

**SECTION I - OTHER AGREEMENTS**

- (1) The Interim shall begin duties in the parish on \_\_\_\_\_.
- (2) All pay and benefits shall become effective on \_\_\_\_\_.
- (3) The Parish shall reimburse the Interim for relocation services.
- (4) A copy of this Ministry Covenant will be sent to the treasurer of the Parish once fully executed by the Bishop.
- (5) This Letter of Agreement shall be made part of the minutes of the next Vestry meeting following its signing, and copies shall be given to each Vestry member and new members thereafter.
- (6) If the Interim and Vestry disagree concerning interpretation of this Letter of Agreement, either party may appeal for mediation to a mutually agreed upon third party, the Bishop remaining the final arbiter.
- (7) The Bishop strongly recommends all churches to participate in the Diocese Payroll Service. Please contact Therese Lynaugh, payroll processor, at (516) 248-4800 x168 to obtain enrollment forms, if needed.
- (8) This agreement is contingent upon the completion of a satisfactory background check and proof of attendance at Sexual Harassment/Exploitation and Child Abuse Prevention Workshops

\_\_\_\_\_  
Interim

\_\_\_\_\_  
Date

\_\_\_\_\_  
Warden

\_\_\_\_\_  
Date

\_\_\_\_\_  
Warden

\_\_\_\_\_  
Date



---

Bishop

Date

## **APPENDIX H: Priest-in-Charge Program in the Diocese of Long Island**

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 new clergy at present. It is a recognition that the congregation "has some issues to work through" and would be better served by a significant period of time devoted to strategic planning/discernment and/or consideration of significant issues (e.g., finances, conflict) before it proceeds with the search.

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 local candidates or recruit qualified "external" 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 to be 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 web site. 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.**

### 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?

PIC is doing 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- New covenant of ministry is created;
  - PIC is not called as rector but becomes Interim during clergy search;
  - PIC completes covenant of agreement and an Interim or another PIC is appointed.
  - PIC covenant agreement with congregation is renewed for an additional period
4. Closure Stage: If PIC is appointed rector, focus becomes setting short/long-term goals and strategies. If PIC not appointed rector or is not reappointed, congregation discerns with Diocese what next steps might be.



## Applicable Canons of the Episcopal Church 2009

### **Canon III.9.3(b) Priests-in-Charge.**

After consultation with the Vestry, the Bishop may appoint a Priest to serve as Priest-in-Charge of any congregation in which there is no Rector. In such congregations, the Priest-in-Charge shall exercise the duties of Rector outlined in Canon III.9.5 subject to the authority of the Bishop.

### **Canon III.9.5 Rectors and Priests-in-Charge and Their Duties**

#### **(a)**

(1) The Rector or Priest-in-Charge shall have full authority and responsibility for the conduct of the worship and the spiritual jurisdiction of the Parish, subject to the Rubrics of the Book of Common Prayer, the Constitution and Canons of this Church, and the pastoral direction of the Bishop.

(2) For the purposes of the office and for the full and free discharge of all functions and duties pertaining thereto, the Rector or Priest-in-Charge shall at all times be entitled to the use and control of the Church and Parish buildings together with all appurtenances and furniture, and to access to all records and registers maintained by or on behalf of the congregation.

#### **(b)**

(1) It shall be the duty of the Rector or Priest-in-Charge to ensure all persons in their charge receive Instruction in the Holy Scriptures; in the subjects contained in An Outline of the Faith, commonly called the Catechism; in the doctrine, discipline, and worship of this Church; and in the exercise of their ministry as baptized persons.

(2) It shall be the duty of Rectors or Priests-in-Charge to ensure that all persons in their charge are instructed concerning Christian stewardship, including:

(i) reverence for the creation and the right use of God's gifts;

(ii) generous and consistent offering of time, talent, and treasure for the mission and ministry of the Church at home and abroad;

(iii) the biblical standard of the tithe for financial stewardship; and

(iv) the responsibility of all persons to make a will as prescribed in the Book of Common Prayer.

(3) It shall be the duty of Rectors or Priests-in-Charge to ensure that persons be prepared for Baptism. Before baptizing infants or children, Rectors or Priests-in-Charge shall ensure that sponsors be prepared by instructing both the parents and the Godparents concerning the significance of Holy Baptism, the responsibilities of parents and Godparents for the Christian training of the baptized child, and how these obligations may properly be discharged.

(4) It shall be the duty of Rectors or Priests-in-Charge to encourage and ensure the preparation of persons for Confirmation, Reception, and the Reaffirmation of Baptismal Vows, and to be ready to present them to the Bishop with a list of their names.

(5) On notice being received of the Bishop's intention to visit any congregation, the Rector or Priest-in-Charge shall announce the fact to the congregation. At every visitation it shall be the duty of the Rector or Priest-in-Charge and the Wardens, Vestry or other officers, to exhibit to the Bishop the Parish



Register and to give information as to the state of the congregation, spiritual and temporal, in such categories as the Bishop shall have previously requested in writing.

(6) The Alms and Contributions, not otherwise specifically designated, at the Administration of the Holy Communion on one Sunday in each calendar month, and other offerings for the poor, shall be deposited with the Rector or Priest-in-Charge or with such Church officer as the Rector or Priest-in-Charge shall appoint to be applied to such pious and charitable uses as the Rector or Priest-in-Charge shall determine. When a Parish is without a Rector or Priest-in-Charge, the Vestry shall designate a member of the Parish to fulfill this function.

(7) Whenever the House of Bishops shall publish a Pastoral Letter, it shall be the duty of the Rector or Priest-in-Charge to read it to the congregation on some occasion of public worship on a Lord's Day, or to cause copies of the same to be distributed to the members of the congregation, not later than thirty days after receipt.

(8) Whenever the House of Bishops shall adopt a Position Paper, and require communication of the content of the Paper to the membership of the Church, the Rector or Priest-in-Charge shall so communicate the Paper in the manner set forth in the preceding section of this Canon.

**(c)**

(1) It shall be the duty of the Rector or Priest-in-Charge to record in the Parish Register all Baptisms, Confirmations (including the canonical equivalents in Canon I.17.1(d)), Marriages and Burials.

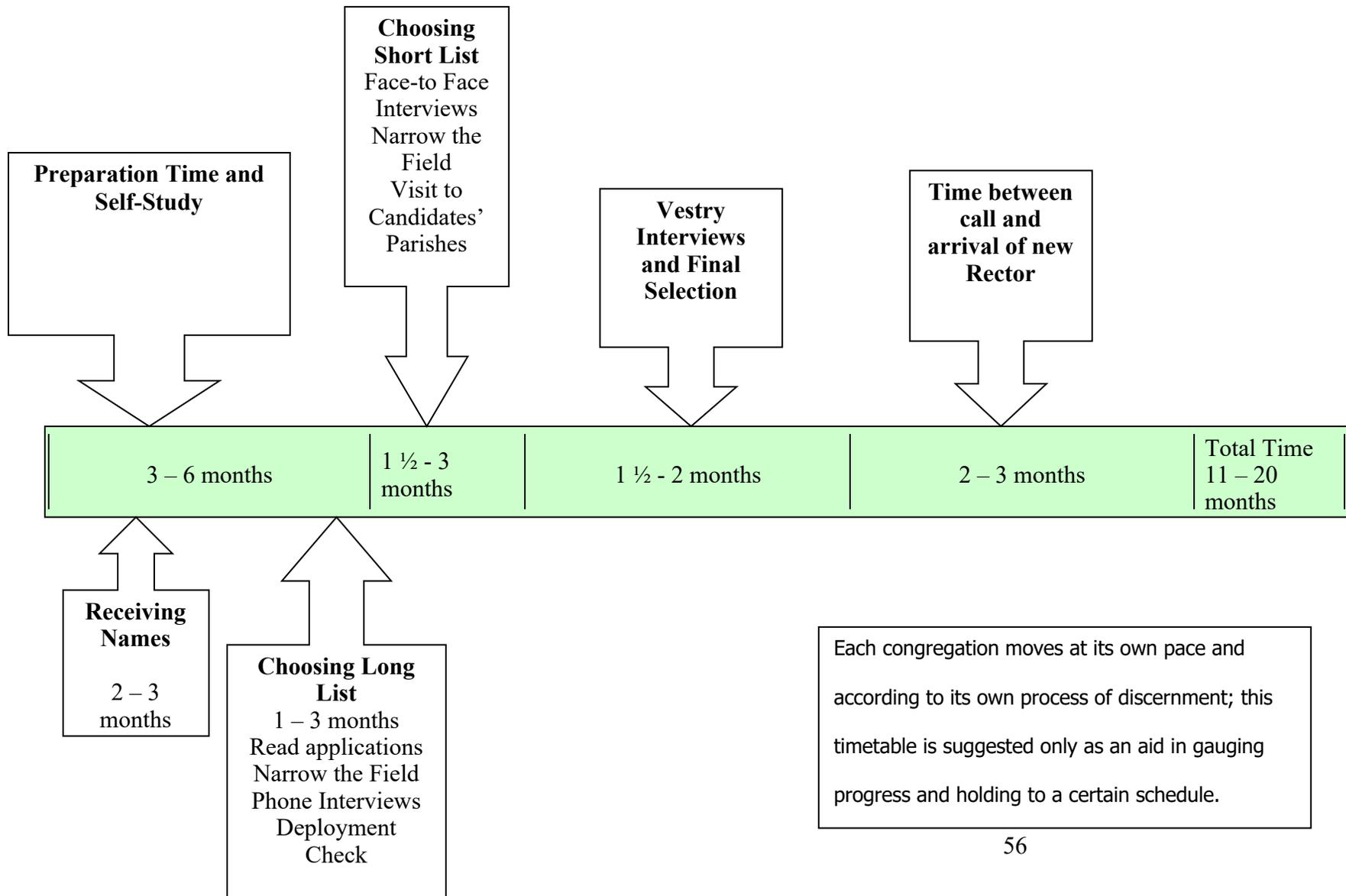
(2) The registry of each Baptism shall be signed by the officiating Member of the Clergy.

(3) The Rector or Priest-in-Charge shall record in the Parish Register all persons who have received Holy Baptism, all communicants, all persons who have received Confirmation (including the canonical equivalents in Canon I.17.1(d)), all persons who have died, and all persons who have been received or removed by letter of transfer. The Rector or Priest-in-Charge shall also designate in the Parish Register the names of (1) those persons whose domicile is unknown, (2) those persons whose domicile is known but are inactive, and (3) those families and persons who are active within the congregation. The Parish Register shall remain with the congregation at all times.



APPENDIX I:

# Transition Process Timeline





## Appendix J: Sample Search Committee Job Description

### Formation of the Search Committee

The search committee is a creation of the Vestry and works for and on behalf of the Vestry. Routinely, formed around the completion of the Self Study. The Vestry calls members to the search committee. 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 search committee
- Wardens/vestry draw up proposed committee membership
- Wardens/vestry confirm willingness of proposed members to serve
- Vestry reviews list of proposed committee members
- Wardens inform chosen committee members and appoint chair and clerk
- Wardens announce committee membership and arrange for commissioning service

### 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. As a rule, 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 Search Committee Members

In the body of Christ, no one member possesses all the gifts, rather we need one another. Likewise, no one search 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 search committee members:

- Good organizational skills (Essential for the Chair of the Committee)
- Team player
- Spiritually sturdy 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 make good search committee members)
- Willing to set aside time necessary to engage in the search work.



## APPENDIX K:

### Sample Budget for Search Process

Search Consultant (Typical 18 mo. engagement)	\$5,000
Discernment Retreat (food, facility expenses, non-overnight)	\$ 500
Telephone and Fax costs	\$ 200
Oxford Document Background checks (3 final candidates)	\$ 45-\$175 per candidate
Short List Candidates Visit to Parish	\$500 - \$2500*
Final Candidates' Visits to Parish	\$ 500 - \$2500*
Webpage Development	\$ 500 - \$2,500*
Moving Expenses of New Rector	\$3,000 –\$12,000 *
Celebration of New Ministry	\$ 300 - \$600

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\*These figures are estimates only and vary greatly depending on how wide the search is extended geographically in the final stages and the location of the rector-elect.

\*\*Costs largely determined by costs of printing parish profile



## Appendix L: Sample Charge from the Vestry to the Search Committee

The following letter of understanding between the Vestry and Search Committee communicates the objectives and responsibilities of the Search Committee in the filling of the Rector position at \_\_\_\_\_ Episcopal Church in \_\_\_\_\_, New York.

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

- Secure the services of clergy during the interim time
- Engage a Search Consultant as recommended by the Bishop's Office to assist in the search process
- Appoint and charge a Search Committee
- 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 Ministry Covenant with the new rector

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

- Elect Vice-Chair (or Co-chairs), Recording Secretary, Corresponding Secretary and a Chaplain
- Work with the Diocesan Search Consultant contracted by the Vestry
- Manage the storage and distribution of written and electronic communication.
- 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
- Determine the format for and conduct a self-study of the congregation
- Develop and implement a process for screening candidates including written questions, reference checks, telephone interviews, visits and interviews with final candidates
- Develop a uniform system of rating and ranking candidates
- 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 1 - 3 final candidates to the Vestry for election and call\*

\* The procedure for electing a new rector may vary from parish to parish. The parish bylaws should be consulted during the process of creating the letter of understanding.



## **Appendix M: Sample Liturgy for the Commissioning of Search Committee**

*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 Search Committee.

*The Celebrant says the following words:*

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 of prayer and discernment 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, a discerning heart, 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 Search Committee 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 Search Committee of \_\_\_\_\_ Church.



## Appendix MM: The Neighborhood Prayer Walk

Our neighborhoods change over time and rediscovering what is changing, who is new and change trends in our neighborhoods is important to discussing a call with candidates. Prayerfully walking through your church's neighborhood and nearby significant gathering areas is vital to discerning what God wants to have happen in your church's call and mission. The link to The Neighborhood Walk is found on The Episcopal Church webpage for evangelism here: <https://www.episcopalchurch.org/posts/evangelisminitiatives/neighborhood-prayer-walks>

## Appendix N: Suggested Profile Webpage 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 posting the profile online on the parish website with a specific webpage for the Rector Search. It should be easily accessible to prospective candidates from the home page of the church website. A link must be sent to the Transition Officer so that the search page may be reached from the Diocesan website.

- **Introduction: Our Mission & Ministry:** Who we are. 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 web site.
- **Where we are located:** A brief geographical and demographic overview of the community in which the church is located, including a brief history of the parish
- **Financial Information:** A statement of current financial and budget information about the congregation; compensation; housing information.
- **Gifts & 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 O – Community OTM Portfolio**

OTM stands for the Office for Transition Ministry. This is a ministry of the national church. The OTM maintains and develops the database of all clergy, congregations and institutions in the Episcopal Church. It is the replacement to the CDO – Church Deployment Office. 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 data base 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** \_\_\_\_\_

**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) \_\_\_\_\_ Life Insurance (yes/no) \_\_\_\_\_ Life Insurance Amount

\$ \_\_\_\_\_

Budgeted Housing Equity Allowance (yes/no) \_\_\_\_\_ If yes, amount

\$ \_\_\_\_\_

Vacation Weeks (check 1) 4 weeks \_\_\_\_\_ One Month (including 5 Sundays) \_\_\_\_\_

Other (please indicate # of weeks and days)

\_\_\_\_\_

Continuing Education: Weeks \_\_\_\_\_ Funding

\_\_\_\_\_

Continuing Education

Details \_\_\_\_\_

Sabbatical Provision (check one) Yes \_\_\_\_\_ No \_\_\_\_\_ Negotiable \_\_\_\_\_

Link to Diocesan Sabbatical Policy:

\_\_\_\_\_

Auto account (Check one) Yes \_\_\_\_\_ Amount: \$ \_\_\_\_\_ No \_\_\_\_\_



Other Travel (check one) Yes \_\_\_\_\_ Amount: \$ \_\_\_\_\_ No \_\_\_\_\_

Professional/Business Account (please check one)

Yes \_\_\_\_\_ Amount \$ \_\_\_\_\_ No \_\_\_\_\_

Comments (20 words)

Previous incumbents in this position

Name \_\_\_\_\_ Date Begun

\_\_\_\_\_ Date Ended \_\_\_\_\_

Name \_\_\_\_\_ Date Begun

\_\_\_\_\_ Date Ended \_\_\_\_\_

Name \_\_\_\_\_ Date Begun

\_\_\_\_\_ Date Ended \_\_\_\_\_

Notes (100 words)

Schools:

Church School:

Children: Students \_\_\_\_\_ Leaders \_\_\_\_\_



Teens/Young Adults: Students \_\_\_\_\_ Leaders \_\_\_\_\_

Adults: Students \_\_\_\_\_ Leaders \_\_\_\_\_

Day School: (check those that apply)

Pre K \_\_\_\_\_ K \_\_\_\_\_ K-6 \_\_\_\_\_ K-12 \_\_\_\_\_ Other \_\_\_\_\_

Student # \_\_\_\_\_ Teacher # \_\_\_\_\_ 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 the following questions. You may answer in multiple languages, if appropriate. Each answer is limited to 100 words maximum. (Attach a sheet with the answers to these questions)**

Describe a moment in your worshipping community's recent ministry which you recognized as one of success and fulfillment.

How are you preparing yourselves for the Church of the future?

Please provide 4–6 words (separated by commas) describing the gifts and skills essential to the future leaders of your worshipping community.

Describe your liturgical style and practice. If your community provides more than one type of worship service please describe all.

How do you practice incorporating others into ministry?

As a worshipping community, how do you care for your spiritual, emotional, and physical wellbeing?

How do you engage in pastoral care for those beyond your worshipping community?

Describe your worshipping community's involvement in either the wider Church or geographical region.



Tell about a ministry that your worshipping community has initiated in the past five years. Who can be contacted about this?

What is your practice of stewardship and how does it shape the life of your worshipping community?

What is your worshipping community's experience of conflict and how have you addressed it?

What is your experience leading/addressing change in the church? When has it gone well? When has it gone poorly? And what did you learn?

## CONNECTIONS

**Your worshipping community's website**

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**You may provide the media links to your worshipping community, e.g. audio, video, YouTube, etc.**

**You may provide links here to other sites where you might be found, e.g. blogs, Facebook, LinkedIn, etc.**



Languages significantly represented in your parish/institution (approximate # of people)

Languages \_\_\_\_\_

# of people \_\_\_\_\_

Provide worship or classes in the following languages -

## REFERENCES

Please provide contact information for the following references:

**1. Bishop: Name**

**Bishop Contact Information**

**2. Diocesan Transition Minister: Name**

**Diocesan Transition Minister contact information**

**3. Current Warden/Board Chair Name**

**Current Warden/Board Chair contact information**

**4. Previous Warden/Board Chair Name**



## **Previous Warden/Board Chair contact information**

### **5. Search Chair Name**

### **Search Chair Ministry**

#### **Search Chair contact information**

### **6. Parish/Institution Leader Name**

#### **Parish/Institution Leader Ministry**

#### **Parish/Institution Leader Contact Information**

### **7. Local Community Leader Name**

#### **Local Community Leader Relationship to Parish/Institution**

#### **Local Community Leader Contact Information**

## **Appendix P: 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, her ministry, his 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 (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 Long Island? 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, your own experiences? How would you describe your leadership style, with staff, Vestry, parishioners, the community?
- Tell us about your involvement in community and Diocesan activities.

## Sample Questions for Finalists by Vestry

- 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 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 Q: 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.

**Communications 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.

**Communications 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 Diocese of Long Island clergy 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 over stress 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 R: 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. **(i.e. Dear Mother/Father...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. Swithens. 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 **(i.e. Dear Fr./Mother...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. Swithens as this time. We would like you to get to know us better and would like to get to know you better... )**
- 3) Letter stating that you no longer wish to continue on with them **(i.e. Dear Fr. /Mother...Thank you for taking the time enter into the search process here at St. Swithens. After thoughtfully reviewing your materials in relationship to our parish OTM and 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 S: 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.

- A. Some operating principles which worked for us and which we strongly recommend to you:
- Looking for the best match, not the best priest
  - Emphasizing that you are seeking God's will
  - Treating each other with mutual respect and trust
  - Sharing responsibility for prayer and scripture
  - Being open and honest with each other and with the candidates
  - Being sensitive to the candidates and to each other
  - Asking for prayers (and remembering you have ours)
  - Being careful about communications with candidates
  - Maintaining confidentiality
  - Looking for the best match, not the best priest



- B. SUMMARY Information on Candidates (Attached):
- What drew us to the candidate
  - 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
  - Our thoughts about implications for the parish if this person is called
- C. Some process suggestions:
- Begin and end meetings with prayer
  - Read scripture and/or reflection material at each meeting
  - Consider spending retreat day together getting ready
  - Have all Vestry member meet all candidates
    - a.) Prior to each visit:
      - members read and discuss all material
      - members decide as a group
        - what they need to know more about
        - what they have concerns about
    - b.) During each visit:
      - have a standard visit format
      - perhaps have candidates celebrate Eucharist and preach for Vestry
    - c.) Immediately following each visit:
      - have a debriefing period of immediate reactions, feelings, etc.
- D. What we did on the candidates' first visit to Our town
- |           |   |
|-----------|---|
| 4:00 p.m. | Meet at (congregation name)<br>-Tour of neighborhood and building |
| 5:00 p.m. | Informal gathering  |
| 5:20 p.m. | Supper (modest catering)  |
| 6:15 p.m. | Formal interview  |
| 8:30 p.m. | Compline  |
| 9:00 p.m. | Candidate leaves<br>-Sharing of initial reactions                 |
- E. You might want to use second visits to let them know more about:
- Specifics regarding our building
  - Specifics regarding our finances
  - Our outreach
  - The Diocese of Long Island
  - 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
- F. Among other things, we think you will want to further discuss:
- Their relationship with their Vestry
  - Their management style and experience
  - Their experience with mutual ministry review/evaluation



- Housing and salary

#### 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 T: 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 pick-up at the airport, 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 U – Sample Ministry Covenant for Rector

### Ministry Covenant

Between

The Wardens and Vestry of \_\_\_\_\_

And

The Reverend \_\_\_\_\_

who has been elected Rector until such time as the relationship is dissolved by mutual consent or as provided by the relevant Canons of the Diocese of Long Island and the General Convention.

#### PREAMBLE

The Reverend \_\_\_\_\_ (“the Rector”) shall lead \_\_\_\_\_ (“the Parish”) as pastor, priest and teacher, sharing in the councils of this congregation and of the whole church, in communion with our Bishop. By word and action, informed at all times by the Holy Scriptures, the Book of Common Prayer, and the Constitution and Canons of the General Convention and the Diocese of Long Island, the Rector shall proclaim the Gospel, love and serve Christ's people, nourish them, and strengthen them to glorify God in this life and in the life to come.

This ministry covenant will become binding when three copies of this document with original signatures thereon have been sent to the Bishop of Long Island.

#### SECTION A - TIMES OF WORK AND LEAVE

1. The Rector’s work includes not only activities directed to the parish and its wellbeing, but also labors on behalf of the Diocese and community. The Rector’s scheduled workweek, in addition to Sunday worship, is five (5) days of mornings, afternoons, or evenings in various combinations reflecting the demands of this ministry. In general, no more than three evenings per week are expected. The Rector is expected to preserve one continuous twenty-four hour period each week solely for personal and family use. All clergy are required to attend:
  - a) Diocesan Clergy Days
  - b) Deanery Clericus Meetings
  - c) Chrism Mass
2. The Rector will have the following periods of leave at full compensation:



- a) National Holidays, to be taken so as not to interfere with worship on major occasions
- b) Four weeks annual vacation, including five Sundays
- c) The weekdays following Christmas and Easter
- d) One week annually for spiritual retreat
- e) Six days per year for continuing education (in addition to vacation)
- f) Three months full base package following six years of continual service in a parish for sabbatical leave. Upon completion of a sabbatical a clergy person must remain in his or her current position for minimally one year. Unused sabbatical time will be forfeited.

### **SECTION B – COMPENSATION**

The Rector's cash salary will be \$\_\_\_\_\_ per year to be paid bi-weekly. This salary will be reviewed in January of each year, and may be adjusted based upon the action of the Diocesan Convention concerning base diocesan minimum compensation. During the term of this covenant, the Parish shall pay any other expenses related to the Rector's cure at the Parish including Workmen's Compensation required by New York State Law. (n.b. New York State Unemployment Insurance Law excludes any clergy, in the exercise of their ministry, from collecting unemployment insurance).

The Rector shall receive a cash housing allowance which includes utilities in the amount equal to 50% of the cash stipend **OR** The Rector shall have full use of the Rectory as a personal residence. Expenses connected with the Rectory shall be handled as follows:

- a. Utilities shall be contracted for and paid by the parish; and
- b. Care and maintenance of Rectory grounds are at the parish's expense.
- c. To ensure proper maintenance and care of the Rectory, there will be an annual walk-through of the house and grounds by the Wardens and Rector.

**(depending on housing provided)** In accordance with Diocesan Policy, a housing equity account shall be established using the Retirement Saving Plan (R.S.V.P) into which an amount of 3% of total compensation as defined by the Church Pension Fund shall be deposited.

As additional compensation, the Rector shall receive a sum equal to 50% of the annual self-employment Social Security Tax.

Parish will make the appropriate contributions to the Church Pension fund on behalf of the Rector. The Church Pension Fund provides the formula used in determining this contribution. Per the current assessable compensation for the Rector, the annual pension contribution will be \$\_\_\_\_\_ **(Bishop's Office will determine)**. The parish will be



billed monthly from Church Pension Fund. Every time a component of the formula changes (salary, utility expenses, housing arrangements, etc.), the annual pension contribution will also change.

Parish will provide and pay 100% of the premiums for adequate medical and dental insurance through the Episcopal Church Medical Trust for the Rector (and their spouse?). Due to the densely populated networks in our area, the Diocese has determined adequate coverage to be the Anthem BCBS BlueCard PPO 90 and Anthem BCBS CDHP 20/HSA for medical and the Aetna DMO for dental.

The Parish will provide Group Life and Accidental Death and Dismemberment Insurance, equivalent to the group plan provided through The Church Insurance Company.

The Diocese will provide Continuing Education training at the Mercer School of Theology, up to a \$2,000 value. The Parish will provide a minimum of \$750 per year for additional Continuing Education costs.

### **Expenses**

The Parish will pay the following business expenses incurred by the Rector in fulfilling the duties of the office:

Reimbursement for the use of a personal automobile for Church business at the rate of 54.5 cents per mile or such other amount as the IRS may prescribe for the business use of a privately-owned vehicle, and any other transportation expenses incurred while on Church business, in accordance with IRS criteria and the Manual of Business Methods in Church Affairs.

The normal expenses of the Church's office operation, such as telephone, postage, office equipment, supplies, secretarial services, books and periodicals, as well as usual and customary expenses incurred in carrying out pastoral duties.

Telephone and internet access at the Rectory. The telephone number shall be published.

### **Supplementary Compensation**

The Rector shall not charge fees for performing any rites of the Church (for example, Baptisms, Marriages and Funerals) for members of the Parish. However, the Rector may receive income from other sources, such as Sacramental services on behalf of persons not in any way related to the Parish; fees and honoraria for professional services performed on personal time for groups unrelated to the Parish; or for sermons, books or articles published outside the parish.

### **SECTION C – ALMONERS FUND (Discretionary Fund)**



The Parish will provide \$ [redacted] from the operating budget each year for an Almoners Fund to be dispersed by the Rector. Almoners Fund is an account of the Parish. It may be kept in a separate account in the name of the church (i.e. "Parish: Rector's Almoners Fund"). Almoners funds are subject to audit and are included in financial reports following standard accounting procedures.

#### **SECTION D - USE OF BUILDINGS**

In addition to use and control of the Church and Parish buildings for the discharge of duties of the Rector's office, as provided by canon law, the Rector in consultation with the Vestry shall have the right to grant use of the buildings to individuals or groups from outside the parish, following guidelines approved by both Rector and Vestry.

#### **SECTION E - CHURCH LEADERSHIP TEAM RETREAT**

A Church Leadership Team Retreat provides a time apart for the Vestry and Rector to begin to define and understand their relationship. This retreat should be held at a time convenient for the Rector and the church leadership. The retreat covers a range of topics, which include:

- Spiritual Reflection
- Develop Guidelines for Working Together
- Clarify Expectations
- Review Goals
- Clarify Roles and Responsibilities
- How to Deal with Differences

#### **SECTION F - MUTUAL STUDY OF MINISTRY**

A Mutual Study of Ministry will be scheduled between the first fourteen to eighteen months of a new pastorate and once every year thereafter. This will give the Vestry and Rector time to talk together about ways to improve their working relationships, to discuss how the various church activities and programs are meeting the needs of the church and its members, and to look at new ideas for ministry. It is a time to ask:

"What is working well and what needs our attention?"

"Do we need to make changes in our stated goals?"

"Are our goals relevant to where we find ourselves today?"

"Are our expectations fair, realistic, a stretch, but not impossible?"

The Mutual Study of Ministry will be facilitated by a trained consultant.

#### **SECTION G - REVISION**

This letter may be revised only by mutual agreement at the time of the annual mutual study of ministry, except that revisions of compensation and expenses may be mutually agreed upon in a separate budget process.



**SECTION H - OTHER AGREEMENTS**

- (1) The Rector shall begin duties in the Parish on \_\_\_\_\_.
- (2) All pay and benefits shall become effective on \_\_\_\_\_.
- (3) A copy of this Ministry Covenant will be sent to the treasurer of the Parish once fully executed by the Bishop.
- (4) This Ministry Covenant shall be made part of the minutes of the next Vestry meeting following its signing, and copies shall be given to each new Vestry member.
- (5) If the Rector and Vestry disagree concerning interpretation of this Ministry Covenant, either party may appeal for mediation to a mutually agreed upon third party, the Bishop remaining the final arbiter.
- (6) This Covenant is contingent upon the completion of a satisfactory background check and proof of attendance at Sexual Harassment/Exploitation and Child Abuse Prevention Workshops and Racial Awareness Training.
- (7) The Bishop strongly recommends all churches to participate in the Diocese Payroll Service. Please contact Therese Lynaugh, payroll processor, at (516) 248-4800 x168 to obtain enrollment forms, if needed.
- (8) During the first full year, the Rector will participate in the Leadership Program for “First Tuesdays” through the Bishop’s Office.

\_\_\_\_\_  
Rector

\_\_\_\_\_  
Date

\_\_\_\_\_  
Warden

\_\_\_\_\_  
Date

\_\_\_\_\_  
Warden

\_\_\_\_\_  
Date

\_\_\_\_\_  
Bishop

\_\_\_\_\_  
Date



## **Appendix V: 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: 516-248-4800 x35.

### **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 list 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 Long Island (see next page).



### **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 rector. This often prompts a three-way discussion between the Bishop (or designated), the Priest-in-Charge and the vestry.
- B. With 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 minute, using the language contained in the Canons of the Episcopal Diocese of Long Island that follows:

"TO THE RIGHT REVEREND A.B., Bishop of Long Island:

WE, the Church wardens of \_\_\_\_\_ on behalf of the Vestry of said Parish, now without a Rector, do hereby present unto you The (ecclesiastical title) C.D., trusting that it will be your pleasure to find that said person is a duly qualified Priest and respectfully requesting that upon said C.D.'s accepting the office you forward this Notice to the Secretary of the Convention to record the same.

Further, we respectfully request that upon said establishment of the relation of the Rector and the Parish you institute and cause to said C.D. to be inducted into the same, with all its rights, members and appurtenances, and to do and execute all other things on said C.D.'s behalf which shall belong to your Episcopal Office.

IN WITNESS WHEREOF, we have caused this instrument to be executed the \_\_\_\_\_ day of \_\_\_\_\_, in the year of our Lord \_\_\_\_."

### **Important Note:**

**The Announcement of the call of a new rector may not happen until the rector, wardens and bishop have signed the Ministry Covenant.**



## **Appendix W: LICENSING and CALLING of CLERGY FROM OUTSIDE THE UNITED STATES**

### **INTRODUCTION**

The deployment of priests who are not United States citizens and who are not ordained in or canonically resident in the Episcopal Church in the United States of America is complicated. Significant issues need to be addressed: immigration status, canonical residence and licensing, knowledge of the polity, worship, authority, and Canons of the Episcopal Church, and the search process. We hope the following will be helpful.

### **IMMIGRATION MATTERS**

All clergy from outside the United States (i.e. those who are not United States citizens) who seek to be licensed to officiate or attain canonical residence in this Diocese must be prepared to furnish the documents required by the Immigration & Naturalization Service for Employment Eligibility Verification. You must obtain all necessary Visas as may be required and must establish your legal right to work as a member of the clergy in the Diocese of Long Island.

**The initial application and renewal process is complicated and costly. It is strongly recommended that clergy consult with an immigration lawyer**, particularly since the requirements and processes have become much more restrictive since September 11, 2001.

### **CANONICAL MATTERS**

Any priest who comes to the Episcopal Church from another church in the Anglican Communion must fulfill all the requirements of the national church canons (see pertinent provisions of Title III, Canon 10).

### **For Person's Requesting a License to Officiate as a Priest**

The granting of a license to officiate is a process distinct from granting canonical residence. A license to officiate must be renewed after 12 months time, the bishop having full authority to grant or revoke a license.

In order to receive a license to officiate, the clergy person must present a "letter of good standing," signed by the Ecclesiastical Authority of the diocese in which he or she is canonically resident stating that the clergy person's letters of Holy Orders and other credentials are valid and authentic. **The letter of good standing must be issued by a Bishop that is in communion with the Episcopal Church, and whose authority is acknowledged by the Episcopal Church.** The letter of good standing must testify that the clergy person has exhibited to the Ecclesiastical Authority satisfactory evidence of "moral and godly character" and of "theological qualifications." Applicants should submit a letter to the bishop outlining why he or she is requesting the license and how he or she hopes to serve in the diocese and a letter from the rector or vicar of the congregation in the Diocese of Long Island with whom the clergy will be affiliated is also required.



### **Clergy Called to Take Charge of a Congregation or Desiring Canonical Residence**

Before being permitted to take charge of any congregation, or becoming canonically resident in the Diocese of Long Island, the national canons require that the bishop receive Letters Dimissory or their equivalent from the bishop with whose diocese the clergy person was last connected. The letters or credentials must be delivered within six months from the date that they were issued.

Before receiving the clergy person, the Bishop of Long Island will require a promise in writing from him/her to submit in all things to the Discipline of the Episcopal Church and to the declaration required in Article VIII of the Constitution of the Episcopal Church.

**I do believe the Holy Scriptures of the Old and New Testaments to be the  
Word of God,  
and to contain all things necessary to salvation;  
and I do solemnly engage to conform to the Doctrine,  
Discipline and Worship of the Episcopal Church.**

The canons also require that the Bishop of Long Island and at least one presbyter examine the person as to his/her knowledge of the history of the Episcopal Church, its workshop and government and be satisfied of the clergy person's theological qualifications. In some instances, the bishop may require the person to take courses in Episcopal polity.

Also required by the canons is the successful completion of the physical, psychological and psychiatric evaluations. Provisions for the psychiatric and psychological evaluations are made through the bishop's office. The cost of these evaluations (approximately \$1700) is paid by the member of the clergy or the congregation in which he/she will serve.

Additionally, any member of the clergy making application to a parish in this Diocese must have an Office for Transition Ministry portfolio (OTM). Clergy from outside the Episcopal Church may request permission to obtain access to the OTM at [www.otmportfolio.org](http://www.otmportfolio.org)

**Meeting all requirements set forth above (including the associated expenses) is the sole responsibility of the clergy person making application in this Diocese, and there is no guarantee that an applicant will be granted a license to officiate (LTO) or canonical residence. The final decision is made by the Bishop of Long Island after reviewing the final reports.**

### **Additional Requirements**

All clergy serving in the diocese, either under license or canonical resident must have a background check performed by the Oxford Document Management, Inc. and must participate in Diocesan Safe Church and Anti-racism training programs.



### **THE CALLING OF CLERGY IN THE DIOCESE OF LONG ISLAND**

Positions in the Episcopal Diocese of Long Island are not generally filled by placement or appointment. They are filled by a process of discernment whereby candidates apply, interview, and compete with a field of other candidates. In order to participate in that process, candidates are expected to submit a resume and an Office of Transition Ministry Portfolio and be available to participate in a series of interviews in the parish. Members of parish search committees expect to visit candidates in their home parishes. Often the cost of interviewing and moving of a priest from overseas is too prohibitive for many of our parishes. No position is filled without the approval of the Bishop of Long Island. Open positions are found on our Diocesan web site.

All clergy from outside the United States who are not yet canonically resident in the Diocese of Long Island and who wish to be considered by a congregation for a cure as rector are subject to all Diocesan policies and procedures clergy/congregation transitions contained in the Congregation Transition Process Manual in addition to satisfying the requirement for canonical residency set forth in this policy document. Congregations who wish to call as rector, priest-in-charge, interim ministry clergy, curate or assisting clergy someone from outside the United States should familiarize themselves with the requirements for establishing canonical residency in this Diocese (cf. above)

### **SHARING IN THE COUNCILS OF THE CHURCH**

The bishop encourages all licensed and canonically resident clergy to participate in the life of this Diocese through his or her involvement with the work and activities of a parish, deanery, & affiliated institutions of the diocese. At a minimum, all clergy are required to attend Clergy Days, Clericus/Deanery Meetings, Clergy Conference, and each annual meeting and special meetings of the Diocesan Convention. We also highly encourage clergy to attend the institution ceremonies of new rectors and ordinations. Some clergy may be required to submit periodic reports of the ministry and activities of the parish or mission in which they serve.



## Appendix X: 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 a written 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 Y: 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 Sr. 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 Jr. 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 Sr. 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 which 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 Z: 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 parish bylaws and diocesan canons
- The last two or three issues of the parish newsletter, diocesan newspaper, 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 days and other ecclesiastical matters