

GUIDE FOR PARISHES IN TRANSITION



The Episcopal Diocese of Delaware
2011 Edition

Table of Contents

INTRODUCTION	3
CLOSURE PHASE: RECTOR AND CONGREGATION	4
Bishop and Vestry Meet.....	4
The Transition Committee	4
Saying Good-bye to the Departing Rector	5
Exit Interview.....	5
Rector Retires in the Community.....	5
How long will the Interim Period be?.....	5
Naming of an Interim Rector.....	6
Role of the Interim Rector.....	6
SELF STUDY PHASE	7
Vestry Appoints a Search Committee.....	7
Vestry Charge to the Search Committee.....	7
Transition Consultants	7
Preparation of Parish Profile	8
Completion of the Community Ministry Portfolio	9
Clergy Compensation Package.....	9
Communications and Confidentiality.....	9
CANDIDATE SELECTION PROCESS	10
Sources of Candidates	10
Search Committee Preliminary Screening.....	10
Bishop and Transition Ministry Officer Check References	11
Checking References.....	11
Interviews: A Time Critical Phase	11
Interview Tasks to be Accomplished.....	11
Meeting with the Candidate on the Compensation Package	12
Candidate’s Visit with the Bishop.....	12
Post Interview Session.....	12
Staying in Touch with Candidates	13
Visiting the Candidate’s Parish.....	13
Selecting the Candidate to Call	13
Vestry Approval of the Candidate.....	14
EXTENDING THE CALL	15
Notification to the Bishop	15
Senior Warden Extends Verbal Call	15
Letter of Agreement	15
Announcement to the Congregation	15
Thanking Those Not Called	15
WELCOMING THE NEW RECTOR	16
Saying Good-bye to the Departing Interim	16
Transition Committee Involvement.....	16
Celebration of a New Ministry	16
Mutual Ministry Review	17
Clergy Care in the Diocese of Delaware.....	17
Appendix A	18
Appendix B	20

INTRODUCTION

A parish entering a transition in its pastoral leadership can experience a demanding time but one essential to the renewal of the church and hearing God's call to mission in a renewed way. The work of transition gains the respect and gratitude of the entire Diocese. At all times it is important to trust in the Holy Spirit's presence.

The process of calling a rector is a partnership with the Diocese of Delaware – its congregations, the Bishop, the Bishop's staff and the Standing Committee. Transition does not occur in a vacuum, but rather as part of an on-going, long-standing relationship and partnership. In Delaware, there is an established record of good transitions through the efforts of faithful lay leadership. Successful transitions are a top priority for the Bishop and the Diocese of Delaware. We know that Delaware is a good place to serve.

This booklet, along with materials supplied by the Episcopal Church's Office for Transition Ministry (OTM), provide a practical time-tested process which seeks God's presence, opens all to the Holy Spirit and hopes and trusts in God's goodness and generosity.

In the pages that follow you will learn about the major phases of the transition process and what actions need to be taken. The Bishop, the transition ministry officer and your transition consultant are available for assistance and support throughout the process.

CLOSURE PHASE: RECTOR AND CONGREGATION

Bishop and Vestry Meet

The wardens have been notified by the rector that he/she will be leaving. The bishop has also been advised and will want to meet with the vestry to pray with them and discuss the implications of the rector's departure. During this visit the bishop or a representative will:

- Describe support available from the bishop's office
- Suggest that a transition committee be appointed by the vestry
- Emphasize the importance of an appropriate farewell for the departing rector
- Review the major items listed in the table of contents of this booklet
- Discuss the process for providing the congregation with an interim rector
- Respond to questions and concerns from the vestry

The Transition Committee

Before describing the role of the transition committee, we need to distinguish the difference between the transition period and the rector search portion of the transition period. The **transition** begins essentially from the date the departing rector gives notice of his/her intent to leave and lasts through at least the first year of the new rector's term. The **search portion** begins when the search committee appointed by the vestry begins its work and ends when a new rector has been called and has accepted the call. However, further distinction needs to be made because it is common for both vestry and congregation to focus almost exclusively on the search portion of the transition. This exclusive focus tends to diminish the very important work that needs to be accomplished before the search portion begins, during the search portion and following the search portion. In other words, the transition is more than the search and focusing almost exclusively on the search can result in important issues and parish needs being ignored to the detriment of the parish's community life.

Essentially, the transition committee is an "umbrella" committee whose involvement spans the entire transition period. Sometimes it will be busier than other times; however, it is not finished until at least one year after the new rector is in place.

The responsibilities of the transition committee can include:

- Assisting the vestry in selecting an interim rector
- Coordinating the farewell to the departing rector
- Arranging with the transition ministry officer for an exit interview with the departing rector which is shared with the vestry, transition committee and search committee
- Working with the vestry and if helpful a transition consultant to air issues that have surfaced (either long standing or new) with the rector's departure
- Coordinating the welcome for the interim rector
- Assisting the search committee in arranging parish-wide activities to obtain information for the parish profile
- Communications with the parish on transition events

- Coordinating a farewell for the departing interim rector
- Welcoming and assisting the new rector into the life of the congregation
- Providing a support group for the new rector during the first year(s)

The question might be raised: “Why can’t the vestry do the things described above?” Experience has shown that wardens’ and vestry members’ responsibilities increase during a transition period, leaving little time for the above mentioned items.

Depending on parish size, the membership of a transition committee can vary from three to five members who are not on the vestry. This assumes that these members recruit others to help them with specific tasks.

Saying Good-bye to the Departing Rector

Leave-taking from a parish will set the tone for the future transition. How “saying goodbye” occurs will have a definite impact on going forward for both departing rector and members of his/her congregation. Much has been written about the need for time to mourn the departure of a person who may have had a deep personal relationship to a number of members. However, it must be recognized that there may also be feelings of relief on the part of other members who were not strong supporters of the rector. People will be in different places. Expressions can range from sadness, anger, anxiety, to thankfulness or being untouched.

In the case of the rector it is important that he/she take the opportunity to say good-bye both on an individual basis to members with whom there has been a close working relationship and on a corporate basis to the congregation. Rectors should be encouraged by the transition committee to take the time and make the effort to achieve a sense of closure with their members. It is beneficial to the spiritual and emotional health of the congregation and the departing rector.

Exit Interview

Part of the closure process with the departing rector is an exit interview. The diocese can provide a consultant who will perform the interview. The insights gained from the interview can be shared with the transition committee, vestry and the search committee.

Rector Retires in the Community

If the departure of the rector is due to retirement and his/her plans include remaining in the community, it is important that members of the congregation and the departing rector understand that he/she is no longer their pastor. The departing rector should seek a new church at which to worship and both the departing rector and members of the congregation need to exercise restraint in continuing contacts. This may be difficult for some persons, but it is a necessary step in embarking on the transition journey.

How long will the Interim Period be?

There are a variety of factors which shape the interim period. During this time (i.e. the time when there is no regular rector) the bishop assumes the role of rector; however, he/she does this with the assumption that the wardens and vestry will have new responsibilities. This time period calls for an increased level of leadership from the vestry and all those in lay leadership roles.

The interim time allows a healthy transition and effective ministry while a congregation seeks new ordained leadership. When the energy present is properly focused it offers congregations:

- Time to look at themselves during a self-study
- Time to separate from the leadership of the departing rector
- Time to strengthen and inform lay leadership
- Time to clarify mission and direction
- “Time to find a priest to lead the congregation in that mission and direction.”¹

Experience reveals that each parish is different. Transition moves at a pace appropriate to the life of the congregation. There will be the opportunity to assess leadership and examine the congregation’s life which will unfold as the transition proceeds. Once again, trust in the Holy Spirit’s presence and movement through the transition is important. Without question the calling of a priest to be your pastor and spiritual leader who will minister to a diverse congregation requires thought and prayer.

Naming of an Interim Rector

The bishop and the transition ministry officer will provide the vestry with the name(s) of candidates interested in serving as interim rector. This is a vital ministry of the church and many of those who practice it have had specialized training in interim ministry. The vestry will need to come to agreement with the interim rector candidate regarding the terms of his/her employment including a position description that clearly outlines the duties and responsibilities of the position. This is incorporated into a Letter of Agreement, examples of which are available from the diocese.

The transition committee can be of assistance in selecting and orienting the interim rector who will be most effective if welcomed into the parish and supported by the vestry and wardens. The interim rector should attend all vestry meetings; however, most interim rectors prefer that the senior warden officiate at the meetings.

Role of the Interim Rector

“The interim pastor, working with the vestry and transition committee, provides the leadership necessary to maintain stability during the interim period. He/she brings a non-anxious presence to a grieving, uncertain or conflicted congregation. A key task is to help the congregation complete its disengagement from previous chapters in its life as it begins the self-study related to the search process.”²

¹ Interim Ministries – Book 2, The Office for Transition Ministry

² Interim Ministries – Book 2, The Office for Transition Ministry

SELF STUDY PHASE

Vestry Appoints a Search Committee

It is the vestry's responsibility to appoint the search committee. The ideal size of the committee is 8-12 members representing different constituencies, (e.g. different services, age groups, new members, long time members, etc.). Members selected should be willing and able to serve in a process that is rewarding, but can be lengthy and consuming of time and emotional energy.

The wardens should not serve on the committee. While it is helpful to have a vestry presence on the committee the number in most cases should not exceed two because the interim period places extra leadership demands on the vestry. Having several members of the vestry involved in the search diminishes the vestry's ability to handle the critical tasks that need their attention.

Vestry Charge to the Search Committee

The search committee is a committee which reports to the vestry and receives its authority and direction from the vestry. It is important that the search committee have a clear idea of the vestry's expectations. These are set out in the charge to the search committee. As such, the charge should:

- Be in writing
- Be clear as to expectations
- Provide a time frame with some flexibility
- Provide a budget for expenses incurred in the search
- Make recommendations for reporting progress to the vestry and the congregation
- Usually provides for a transition consultant to work with the committee and the vestry
- Recommend regular consultation with the diocese

The vestry then announces the names of the search committee members, invites the congregation to pray and support the committee and encourages its member's attendance at the commissioning. At this point, the vestry is free to return to its duties and to receive reports, questions and concerns from the newly appointed committee. The vestry does not involve itself in the search process, except for prayer and possible social gatherings with the rector candidate(s) until the search committee is ready to make its recommendation.

One of the search committee's first responsibilities is to prepare a prayer that will be recited before each meeting of the search committee and at each service held in the church. Other initial organizational tasks include the selection of co-chair persons and a recording secretary. Many search committees also appoint a chaplain or spiritual director. This is also the time when the commitment to attend all meetings of the committee is reaffirmed and a preliminary meeting schedule is developed. Finally, within a month of starting the work of the search committee, a preliminary time line of dates and tasks to be accomplished should be worked out.

Transition Consultants

The bishop or transition ministry officer usually will recommend the retention of a transition consultant to work with the transition and search committees as well as the vestry. These are

persons who help guide the vestry and its committees through the various phases of the transition journey. There can be pitfalls on this journey, in which instances, the skills and knowledge of a consultant can be a significant resource.

Preparation of Parish Profile

Preparation of a parish profile can seem like a daunting project to search committees. However, if the project is broken down into smaller tasks and the various skills and abilities of the search committee members are utilized the work will go smoothly and the result will meet expectations. The purpose of the profile is to provide a capsulated picture of your parish that tells prospective rector candidates who you are, where you have been and where you want to go. The transition consultant can be of assistance in this activity.

In order to get an accurate sense of who you are, where you have been and where you want to go it is often helpful to survey the members of the congregation as to their opinions, needs, priorities and expectations regarding the future direction of the your mission and ministries. This is frequently done through the use of a questionnaire. However, committees have also done it by drafting a set of questions and holding meetings with members of the congregation to get their response. Sometimes a combination of both approaches is used. Others have used electronic, on-line survey tools which can quickly capture the information the committee seeks

The principle sections of a typical profile include the following: (not necessarily in this order)

- Statement of the parish's mission and vision
- Description of what is expected from a new rector
- Description of ministries and activities
- Brief history of the parish
- Summary of survey results
- Description of strengths and weaknesses (if not present in survey results)
- Description of facilities
- Financial status including operating budget
- Description of the community/area
- Profile of the diocese
- Parish organization and staff

Many parishes now use a tri-fold brochure to portray the parish. It is highly recommended that in addition to the parish profile both be published on the parish website. This has become the norm. Many clergy who feel called into their own transition will use the internet to gain knowledge of potential calls. The value of the internet as a tool for congregations and clergy in transition must not be underestimated.

When a draft of the profile is complete, a copy should be sent to the bishop's office so that it can be reviewed by the members of the Standing Committee. This review by committee members can be quite helpful as they bring an outside perspective as well as the experience that comes from having read a number of profiles. More will be said about the Standing Committee's role in the transition process in the next section of this guide.

Completion of the Community Ministry Portfolio

The work done in preparation of the parish profile will be helpful to the search committee and the transition consultant as they approach this next step in the self study phase. First, a brief word regarding the Office for Transition Ministry: *This organization located at the Episcopal Church's offices in New York City is dedicated to assisting transitions through the Community Ministry Portfolio for congregations and the OTM Portfolio for clergy - these two tools assist in identifying possible matches between clergy and congregations.* The Community Ministry Portfolio is an essential element of the transition and the calling of a new rector.

The Community Ministry Portfolio worksheet is available from the diocesan transition ministry officer or transition consultant and may be located on-line (see resources at the end of this document). The Community Ministry Portfolio worksheet has sections for: basic information; compensation, benefits and housing; work history and skills and a list of narrative questions.

Clergy Compensation Package

As mentioned above, the Community Ministry Portfolio will require specific information on the compensation package which the vestry is prepared to offer the called rector. The amounts stated for salary stipend, housing, utilities, and other items are not “carved in stone” and are subject to further refinement and negotiation. It is a critical piece of information for potential candidates to weigh when deciding their interest. The Diocese of Delaware makes available an annual update of its Active Clergy Guide that provides policy guidance in all areas of clergy compensation. Careful study of this guide by the wardens, finance chair/treasurer and search committee co-chairs is critical. After the compensation package is drafted it requires vestry approval.

When the Community Ministry Portfolio is completed it should be sent to the transition ministry officer who will review it for accuracy and then complete the document on-line.

Communications and Confidentiality

Communications with the congregation during the transition period is very important. As mentioned earlier, there is often a fair amount of anxiety among members during this time and rumors and false information spread rapidly in such an environment. The search committee should work with the transition committee and the vestry to provide the congregation with on-going information about the search and other related issues. Announcements at the worship services, articles in your newsletter and letters to member's homes are all helpful in this effort.

What information can be communicated and what should not? Basically, it is appropriate to provide brief biographical information about the interim rector or supply priest, once she/he has agreed to serve. As regards communications about the search, it is best to focus on the process and its various steps, thus keeping the congregation up to speed on the progress being made. What must be kept confidential within the search committee are the names of candidates being considered. Even after a call is made and accepted, the names of all other candidates considered should remain confidential. Often, search committees solicit questions or suggestions from members on the search.

CANDIDATE SELECTION PROCESS

The Bishop's Office works in close collaboration with the Standing Committee, diocesan clergy, search consultants, and parish search committees to identify and recruit gifted clergy to serve in this diocese. Our goal is to match gifts, talents, and experience of the priest with the needs, opportunities, and challenges of the ministry. As we search for candidates, we will attempt to cast the net as broadly as possible. The resources used in this process include: the Office for Transition Ministry, referrals, recommendations, and advice of search consultants.

In general we seek the following qualities in candidates:

Holiness - Do we have a lively sense of Christ's presence in the life of this person? Do others join in recognizing what we see? How would we describe the gifts, passion, creativity, energy, and enthusiasm that this person might bring to a new ministry?

Competence - Ministry requires a variety of talents and skills. Does this person have a share in these gifts that a new ministry will require? Can the person be developed through training and formation?

Stability of Life - Extending a call is an investment of hope and trust by the Church in a person. Does this person demonstrate the notes of personal maturity and stability that point toward fruitful future ministry?

Will This Ministry Be a Blessing to this Person? - Ministry is not simply a job. It is a way of life. It is a way of following Jesus. Can we see how this new ministry will be rewarding, satisfying and life-giving to this person?

Will the Ministry of this Person Be a Blessing to the Church? - What fruit will ordained ministry bear through the life of this person? Will the Church be built up? Will God's people be strengthened and encouraged? How do we imagine this happening?³

Sources of Candidates

Candidates identified through the Office for Transition Ministry are a major source of candidates. However, this is not the only one. The bishop and the transition ministry officer are always compiling files of possible candidates who come to their attention both within the diocese and in other dioceses. In addition, priests who learn of the rector position may decide to contact the diocese regarding their interest. Finally, members of the congregation and diocesan clergy will often submit names to the search committee of priests they would like to receive consideration.

It is requested that search committees who receive inquiries directly from priests for rector positions or names of priests from members forward these inquiries and names to the transition ministry officer who will be compiling a file of possible candidates and who will be keeping candidates apprised of their status.

Search Committee Preliminary Screening

Once the Parish Profile has been finalized, printed, placed on the church's website and candidate names have been collected from the sources previously mentioned, we are ready to begin the screening process. There is a need for a preliminary screening because candidates who have been suggested have not been asked whether they have any interest.

The next step is for the search committee to name two representatives to meet with the bishop, the transition ministry officer and a member of the standing committee to review a candidate list that

³ Clergy Safe Church: Policies and Practices

contains names of potential candidates. The objective of this meeting is to narrow down the list to a reasonable number of candidates. This process involves reviewing the candidate's OTM Portfolio against the parish requirements for a rector that are reflected in the Community Ministry Portfolio and the Parish Profile.

Bishop and Transition Ministry Officer Check References

Those who express an interest from the list of candidates that result from the screening process are then checked for character and ministry skills and abilities by the bishop and the transition ministry officer through their counterparts in other dioceses. The objective is to produce a list of three or four candidates who are approved by the bishop and standing committee. These candidates are presented to the search committee for interviews and visits to the candidates' churches. Once the bishop's list of finalists has been provided, the search committee is free to choose who among this list they wish to recommend to be called to serve as Rector.

Checking References

Essential to matching candidates and new ministries are reference checking, personal interviews, and site visits.

Before interviewing candidates, the search committee will check at least three (3) references provided by the candidates. The Bishop's Office will also check references for every final candidate in a search as well as a personal interview with each final candidate. Before the search committee embarks on its reference checking it is helpful to agree in general terms on the areas of questioning. Since most references provided by the candidates are selected with the assumption they will provide a positive reference, it is important that items of concern to the committee be phrased in a fashion that will most likely result in obtaining the information needed by the committee. The transition consultant can be of assistance in this task.

Interviews: A Time Critical Phase

Once the approved list of candidate finalists is in the hands of the search committee it needs to move expeditiously to schedule interview visits. Search committees have lost candidates to other parishes by setting too leisurely a pace during this critical time period. It is likely that one or two of the candidates to be interviewed are already in one or more search processes with other parishes. A reasonable goal is to have candidate interview visits to the parish and return visits to the candidates' parishes completed in six weeks or less depending on the number of candidates to be scheduled. Keeping this in mind, it is helpful if the search committee begins planning the interview phase prior to being given the approved candidate list.

Thoughtful interviewing will distinguish between skills and experience and the style and personality of candidates. It will also recognize that candidates interview the search committee likewise. The candidate's visit to the search committee is an opportunity for the committee to welcome the candidate and present the congregation in the best possible way. It is a time to tell the story of your church – to speak about why it is a good place to serve.

Interview Tasks to be Accomplished

While not all inclusive, the tasks listed below are a good summary of things to be done. Again, the search committee will want to involve their transition consultant in planning and preparation for this phase.

- Block out committee members calendars for the interview time period

- Reaffirm commitment of members to be available for the interviews and visits
- Develop a model interview visit schedule with time for each event including a visit to meet the bishop
- Wardens and finance chair/treasurer prepare for discussion of parish and clergy compensation package with each candidate
- Prepare questions to be asked and anticipate responses to questions the candidate will ask of the committee
- Agree on who will serve as candidate host/hostess during the visit
- Prepare name tags or tent cards for committee members
- Prepare packets of information for candidates to take home
- Prepare interview evaluation form
- Arrange for a practice interview session with a priest from the diocese
- Select one person on the committee to take notes during interviews
- Determine size and make-up of teams to visit candidates' parishes
- Be prepared to discuss dates of follow-up visits to candidates' parishes

Meeting with the Candidate on the Compensation Package

As mentioned in the task list above, time should be set aside during the candidate's visit to the parish for a meeting with the wardens and the finance chair/treasurer to review the rector compensation package. Such a meeting provides the setting to respond to questions the candidate may have, learn more information about the candidate's current compensation situation and any special requirements he/she may want to make known. This goes a long way toward eliminating major surprises for each party should the candidate become the person called. However, it must be emphasized that it is not intended to become a negotiating session.

Candidate's Visit with the Bishop

Generally, the candidate's meeting with the bishop is most effective if it can take place at the end of the interview visit. This sequence allows the bishop to gain a sense of the candidate's state of mind and provides the opportunity to confirm the candidate's impressions and affords an opportunity to learn about the diocese.

Post Interview Session

Following the candidate's interview, the host/hostess will escort the candidate to his/her hotel while the search committee meets to review their collective evaluations of the candidate's interview responses and questions. Generally, the first step in this session is to ask each committee member to complete the interview evaluation form without prior discussion with fellow committee members. When this activity is complete the meeting facilitator will ask each participant to discuss his/her evaluation without interruption for questions. After each member has had the opportunity to do this and their comments have been recorded on a flip chart discussion is opened to questions regarding individual evaluations and general comments.

There are two tendencies to avoid at this point in the process. First, "falling in love with the candidate" which then shuts down both objective evaluation of the candidate during a visit to his/her parish and fair consideration of the other candidates, especially if they have not yet been

interviewed. The second tendency is in the opposite direction where the candidate is eliminated from further consideration before a visit is made to his/her parish.

The policy of the Diocese of Delaware is to schedule the interview visit to the parish seeking a rector first, followed by a visit to the candidate's parish. Both activities are equally important and premature conclusions can be counterproductive. Hospitality and graceful attitude reflect well on both the parish and the Diocese of Delaware. It is consistent with impression others have of this diocese.

Staying in Touch with Candidates

It is important during this phase of the search to maintain contact with the candidates following their interview visits. Generally, the person who has been their visit host/hostess takes on this role. Contact should be made at least once per week to keep candidates informed about the general flow, but not the specific details, of the process. Staying in touch helps to keep the candidate interested in your vacancy and alerts you to any change in the candidate's situation.

Visiting the Candidate's Parish

These visits allow members of the search committee to gain a sense of the candidate in his/her own parish. The visit should provide the opportunity to observe the candidate preside at the Holy Eucharist and preach. In some circumstances it may be possible to talk with the candidate's warden. However, permission must first be given by the candidate.

Generally, the search committee splits into visitation teams of three or no more than four members per team. In many visit situations the priest has not disclosed to his/her congregation interest in another call; therefore, it is important that the visiting team exercise discretion. It is usually a good idea not to sit together during the worship service so as to avoid being conspicuous. The visiting teams upon their return report their impressions to the search committee.

Selecting the Candidate to Call

The search committee's objective is to determine whether it can reach consensus on a candidate to recommend to its vestry which will then vote on whether to extend a call. The term consensus is defined as "a collective opinion, general agreement" and in this context is a decision that all members of the search committee can live with.

In preparation for this discussion, take time to pray individually and as a group. The Holy Spirit is continually present for support and guidance. The search committee co-chairs should see that the following information is available to the committee members.

- The parish goals and rector responsibilities. These are usually addressed in the parish profile prepared by the search committee.
- Interview evaluations. If an interview evaluation form has been used, summarize the ratings on each category.
- Reports from teams visiting candidates' parishes. Let visitor teams speak uninterrupted, saving questions until they are finished. Did they obtain answers to questions that arose from the interview visits?
- Reports on references. Again, were the questions, concerns voiced by the search committee addressed in this process?

With the above mentioned information available as background the committee is ready for discernment discussions. A process for carrying out these discussions is included at the end of this booklet in Appendix B. The search committee co-chairs should review this exhibit with their transition consultant for his/her input.

Vestry Approval of the Candidate

Assuming the search committee has been able to reach consensus on a candidate to recommend to its vestry, the next step is to prepare for this presentation. Some items that the committee may want to discuss among themselves and with the transition consultant may include who will make the presentation to the vestry and what information needs to be prepared in support of the decision. Certainly, one of the items of information the vestry needs for its decision making is the search committee's best estimate of the various components of a compensation package for the rector candidate. Here is where the information gained from the discussion of the parish's compensation package with the candidate during his/her interview visit will be very helpful.

What if the search committee cannot reach consensus on a recommendation for the vestry? In this event, the vestry would be so informed and the wardens would contact the bishop to discuss next steps. These next steps will likely entail an effort on the part of the bishop and transition ministry officer to prepare a new slate of candidates. Inability to gain consensus on a recommendation should not be viewed as a failure on the part of the committee. It is much worse to try to force fit a priest into a role for which he/she may not be suited. The same attitude applies to the situation where a recommended and vestry-approved candidate does not accept a call. We need to remind ourselves that the Holy Spirit is very much a part of the call process and we need to need to keep faith that the appropriate rector will be called.

EXTENDING THE CALL

Notification to the Bishop

The vestry has approved a call being extended to the recommended candidate. This approval should also provide the senior warden with guidelines on the clergy compensation package that permit some flexibility to structure the package to meet the candidate's particular needs while recognizing the parish's financial limits. The next step is a phone call to the bishop by the senior warden advising him/her that the vestry is prepared to extend a call and to whom. Written notice of the election signed by the Church Wardens or the Secretary of the Vestry is then sent to the bishop.

Senior Warden Extends Verbal Call

At this point the senior warden makes a telephone call to the approved candidate extending the offer to become the parish's rector. This is a critical moment for both parties. The warden needs to be enthusiastic and convincing in the message that the parish leadership is united in its desire to call the candidate as their rector. The candidate has been anticipating the call yet may have some questions or even reservations that need to be brought up for discussion. Part of this discussion will include a description of the major components of the clergy compensation package. Hopefully, the outcome of this phone conversation is a verbal acceptance of the call. However, if the candidate has questions or concerns that cannot be quickly resolved it may be necessary for a follow up conversation.

If the phone conversation or subsequent discussions result in the candidate declining the call, then as mentioned earlier, it is important for the wardens to contact the bishop about next steps.

Letter of Agreement

Assuming a positive response to the senior warden's phone call, it is important to promptly follow through with a Letter of Agreement which sets out responsibilities of the rector as well as all the details regarding the compensation package being offered. A model Letter of Agreement is available from the transition ministry officer who, along with the diocesan business manager, is ready to provide assistance. The letter should be signed by the senior warden and sent to the candidate for his/her signature. Upon receipt of the signed letter by the called candidate, the original copy should be forwarded to the bishop for his/her signature. A 15-year background check is then initiated.

Announcement to the Congregation

There is a natural desire to inform the congregation of a successful call. However, it is important to exercise restraint if discussions with the called candidate indicate that all issues have not been satisfactorily resolved. The best indication that this has occurred is a Letter of Agreement signed by the called candidate. The calling of a new rector is a major event in the life of a parish and is much anticipated by the congregation. In addition to announcements in the Sunday bulletin and at the services, it is appropriate to send a mailing to all parish households. This letter from the wardens and vestry should include a short biographical sketch of the new rector.

Thanking Those Not Called

Before the announcement of a successful call, it is an important courtesy to personally contact the other candidates who participated in the search. Don't forget to care for the candidates not called. Notify them by telephone and in a personal letter of thanks.

WELCOMING THE NEW RECTOR

Saying Good-bye to the Departing Interim

While much of the energy of the parish leadership will be focused toward the new rector, it is important to the parish that some celebration of the interim's ministry be held. This event provides the opportunity to say thank you and bring closure to this phase of the parish's transition process. Some other options that may be helpful include: an exit interview conducted by a consultant with the departing interim, making the results of this interview available to the new rector and encouraging access to the interim by the new rector.

Transition Committee Involvement

Certainly the transition committee will want to take on a major role in the start-up of the new rector's ministry. This begins by helping the new rector and his/her family feel welcome upon their arrival. However, after the welcome reception for the new rector and family there is often confusion about what else can be done to assist the new rector in this critical phase of the transition which can extend through at least the first year. Listed below are some questions that the transition committee, the rector and their transition consultant may want to discuss in an effort to ensure a positive start-up.

- How will the congregation and the rector and his/her family get to know and trust each other? Will the transition committee offer assistance in structuring "get acquainted" sessions?
- Will some organized reflection on the congregation's history be offered?
- What is the new rector's plan for coming to know and understand the congregation?
- What is his/her plan of entry and start-up? Will she/he be offered any assistance in reflection on that plan.
- What is his/her strategy regarding making changes in worship or programs?
- Has the new rector had the opportunity to review the exit interview with the former rector?
- To what extent are the perceptions the new clergy person has formed about the congregation grounded in reality? Will the rector have someone available to reflect on these assumptions?
- Will the parish goals set forth in the Community Ministry Portfolio and Parish Profile become the basis for goal setting and mutual ministry review?
- Do both clergy and lay leaders have the skills to accomplish these goals? What outside resources are available to each?

Celebration of a New Ministry

The bishop will be in contact with the new rector and the wardens to schedule this service. It is the opportunity for the parish to celebrate their new ministry in fellowship with the bishop, as well as clergy and guests from other congregations.

Mutual Ministry Review

The Letter of Agreement that has been signed at the beginning of the new rector's call to a parish contains provision for periodic Mutual Ministry Reviews. This process can mistakenly be labeled as a performance appraisal of the rector. The word **mutual** is the key to this exercise because the assumption behind it is that no ministry belongs to one person alone. Lay people and clergy alike share accountability for the stewardship of ministry. Therefore, the mutual ministry of lay members of the congregation and the rector are reviewed together

Due to the mutuality of the review it is the policy of the diocese to require the involvement of an outside consultant to facilitate the review. Further information on this process and help in obtaining a consultant are available from the diocese.

Clergy Care in the Diocese of Delaware

Every priest in the Diocese of Delaware receives a copy of **Clergy Safe Church: Policies and Practices**. New clergy participate in regular gatherings hosted by the Bishop. All clergy are expected to attend regular meetings with their colleagues throughout the diocese as well as an annual retreat/conference. Continuing Education Days occur annually and clergy self-care and education is encouraged and supported by the Bishop. The Diocese of Delaware is a good and safe place to serve in the name of Christ.

Appendix A

The following publications by the Office for Transition Ministry are available on the OTM website: http://archive.episcopalchurch.org/transition/109541_115243_ENG_HTM.htm

They expand upon topics covered in this pamphlet and have proven helpful to transition and search committees.

Parish Calling Kit

[Community Ministry Portfolio Worksheet](#)

When a Search Committee completes this form, and it has been approved by that parish's vestry, it is sent to the bishop or diocesan transition minister who will enter the information into the Transition Ministry database. Once in the database, the parish information provided will be available for viewing.

[Called to Work Together](#)

A handbook on Letters of Agreement for clergy and congregations (by Richard L. Ullman).

[Caring for Clergy in the Calling Process](#)

Guidelines for search/calling committees on the calling process including: appointing a committee; setting a budget; communications; reviewing, visiting, interviewing, choosing and calling candidates. Revised: May 2009 (4th edition).

[Caring for Clergy through Compensation](#)

Guidelines for examining and advocating a theology of compensation in the calling and care of clergy, including: salary, housing, & utilities; benefits; reimbursement for professional expenses, with tax implications of each. Revised: May 2009 (4th edition).

[Caring for Clergy Through Housing](#)

"Caring for Clergy through Housing" is intended to provide a useful and insightful look at the complex and important issue of adequate clergy housing.

[Interim Ministries - Book 1](#)

Overview for church leaders, which defines Interim Ministry, suggesting how this specialized ministry can be useful to congregations. Revised: August 2007.

[Interim Ministries - Book 2](#)

Guidelines for the development and support of interim ministries in dioceses, including: professional standards, Letter of Agreement, training, support, and evaluation of interim ministers. Revised: August 2007.

[Interviewing in the Calling Process](#)

Guidelines to help the search/calling committee make the interviewing process an effective tool to determine a good match between priest and parish. Revised: May 2009 (4th edition).

[Living Into Our Ministries: The Mutual Ministry Cycle](#)

The audience intended to use this guide includes diocesan facilitators, deployment officers, wardens and clergy. Some parts, especially the introduction, will be useful for the whole vestry as a starting conversation on mutual ministry. The document is an educational package with a variety of tools. 91 pages including a bibliography.

[Prayer in Calling Process](#)

This period of search for a new rector can be a time of new and creative activity in the liturgical and devotional life of the parish that can enrich the church for long after the search process is over. This guide offers you resources, suggestions, possibilities, for that journey. Revised: 2007.

[Search](#)

A manual for those called to guide the parish through a process leading to the election of a rector. An invaluable guide to the search process by Charles R. Wilson.

Other resources:

Saying Goodbye: A Time of Growth for Congregations and Pastors; Edward White

Calling Clergy: A Spiritual and Practical Guide Through the Search Process; The Rev. Elizabeth Geitz

The Diocese of Delaware also provides an annually revised edition of Active Clergy Guide.

Appendix B Discerning Whom to Call: A Process for Obtaining Consensus on a Candidate

Discernment Discussions

Objective: The search committee’s objective is to determine whether it can reach consensus on a candidate to recommend to the vestry which will then vote as to whether to extend a call. Consensus is defined as “a collective opinion, general agreement” and in this context is a decision that all members of the search committee can live with.

Preparation

- Meet in a room that permits privacy
- Have a chart pad and masking tape available
- All discussions are confidential and do not leave the room
- Trust, openness and mutual respect are critical to the process
- The search committee co-chairs should decide beforehand who will moderate
- Each search committee member should have copies of
 - ✓ Parish goals
 - ✓ Rector responsibilities and ministry specialties requested
 - ✓ Summary of the interview evaluation forms
 - ✓ Summary of reference checks

Discussion Regarding the Candidates

- Draw numbers from a hat to determine the order in which members will speak
- Each candidate should be discussed separately by each member of the committee, addressing the following:
 - 1) Provide one reason why you would not extend a call to the candidate being discussed.
 - Each member provides one reason in the first round
 - Continue with successive rounds if necessary
 - Record reasons on a chart pad
 - Save questions and comments until later in the process
 - 2) Follow the same sequence as above, however, in this round each member gives one reason why they would extend a call.
 - Continue until all reasons have been presented
 - Again, list the reasons on a chart pad
 - 3) Allow five minutes for prayer and reflection on what has been presented

- 4) Following this pause, as a group, discuss each candidate seeking areas of agreement and the principle areas of concern. The moderator should record these on the chart pad.
- 5) At this point, the moderator may be able to determine if there is substantial agreement on one candidate or substantial division in the committee.
 - If there is substantial agreement, efforts should be directed toward the the issues that need further discussion before full consensus can be reached.
 - If there seems to be substantial division over which candidate to recommend, a pause in the discussions should be taken for further prayer and reflection.
 - After this pause, the moderator should poll the committee as to whether they wish to continue or adjourn and take up the discussion at a subsequent session. It is not unusual to take more than one session to gain consensus.

Consensus has been Reached on a Candidate

The co-chairs of the search committee need to determine the format of the committee's presentation to the vestry. Will all the members of the committee participate or will the co-chairs make the presentation with the other members in attendance?

Consensus Cannot be Reached on a Candidate to Call

- First of all do not despair. It is also important for the future health of the parish to determine if a call does not seem to be appropriate. Trust in the Holy Spirit to guide your discussions whether it results in a call or it does not.
- Notify the vestry of your situation so that the wardens and search committee co-chairs can contact the bishop who will assist you in the steps you will need to take to continue your search.