

THE EPISCOPAL CHURCH IN WESTERN OREGON

# A GUIDE FOR FAITH COMMUNITIES NAVIGATING CLERGY TRANSITIONS



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

A Prayer for Transition written by the Rev. Raggs Ragan

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## A WORD FROM THE CANON TO THE ORDINARY

Dear Friends,

There have been many major transitions in the life of the church over the past few years and it was time for our clergy transitions to reflect some of these changes. While we still cannot predict every coming change, we can see that every change offers an opportunity for us to reflect and adapt. Consider this document a road map for your faith community as you navigate your path forward. For some this will be more information that you can digest. Do not worry, you will be accompanied along this journey by your Missioner and a consultant that is assigned to be even more hands on with you. For others, having everything laid out in detail will feel like a relief, and we hope that is true.

We also recognize that every faith community is different. Your story, mission, and unique context vary from one community to the next and we will treat each community as such.

Your Bishop and I are with you as you make this transition. We will provide resources, cheering on, and guidance. Honest and open communication between the faith community, clergy, and the Bishop's office is essential to making this process move effectively.

Remember that we believe in a living God who is already with us and constantly calling us to join God in the work of the world. This is an opportunity; for prayerfulness, study, grace, healing, and celebration.

My thanks to the Diocese of Western Massachusetts and the resources provided from their transition process, and the design team that helped create this Transition Guide (Rev. Gail Greenwell, Rev. Linda Potter, Mary Rowe, Cindy Russell, Rev. Wes Sedlacek, and Rev. Tom Sramek).

Faithfully,

A handwritten signature in black ink, consisting of a large, stylized 'C' followed by a horizontal line that loops back under the 'C' and ends with a small cross symbol.

The Rev. Christopher Craun  
Canon to the Ordinary

# SCRIPTURE REFLECTION ON TRANSITION AND TRANSFORMATION

## JOHN 6:16-21

When evening came, his disciples went down to the sea, got into a boat, and started across the sea to Capernaum. It was now dark, and Jesus had not yet come to them. The sea became rough because a strong wind was blowing. When they had rowed about three or four miles, they saw Jesus walking on the sea and coming near the boat, and they were terrified. But he said to them, "It is I do not be afraid." Then they wanted to take him into the boat, and immediately the boat reached the land toward which they were going.

## QUESTIONS

Read the passage above three times, preferably from three different voices. After each reading ask one of the following questions.

1. What word or phrase stood out for you?
2. What might Jesus be saying to you in this passage tonight?
3. How might Jesus be calling you in this passage?

## SHARING

What fear or excitement might you be feeling as we begin this work?

## SHARING RULES

Each person shares their truth; the others listen in silence  
Deep, silent listening and candid sharing

## 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 faith community will be made. Generally, about 60 days' notice should be given. In the case of a retirement, however, a greater span of time may be appropriate (6 months or so) so a thoughtful transition plan may be developed. The clergy and wardens will jointly determine how the faith community will be informed of the priest's departure.

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

The wardens and vestry are the formal and canonical leadership of the faith community during the interim period. As such, they hold the responsibility of choosing a course of action best suited to their particular faith community and situation. With the help of the Bishop's Office, the wardens must make arrangements for the conduct of worship and pastoral care. When there is a gap in official ministries, the wardens can secure names of supply clergy on our diocesan website for Sundays as needed, or make arrangements for training lay leaders who can lead Morning Prayer.

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

This meeting will include a discussion using the Life Cycle of Organizations model (see Appendix A)

### TRANSITION TEAM

The period immediately following the announcement of a priest's departure can be a time of anxiety for a faith community. Strong communication and clear systems for working together to generally reduce anxiety and increase the chances for an effective transition. There is much speculation about "What will happen next?" and "How and when will we get our next priest?" As the canonical leadership during the transition period, the wardens and the vestry will be tasked with the significant responsibility of providing a clergy presence and of maintaining and supporting programs and ministry, a considerable undertaking. It is for that reason that a Transition Team can be an excellent pastoral resource for the faith community. This may include chairs of Profile and Search committees, the two wardens and perhaps one or two ad hoc members. The function of the Transition Team is to point the faith community forward in order to embrace a new vision and possibilities for itself. In the absence of a Transition Team, this work can be done by a subcommittee of the vestry. See: "Responsibilities of a Transition Team" (Appendix B).

### SAYING GOOD-BYE

The vestry, faith community, 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 faith community, or even because of differences with the faith community, the elements of the separation process remain the same. Much of the energy of the faith community during this time should be devoted to saying “good-bye” in the best possible way. The key to a successful search begins with a good goodbye.

Clergy and wardens should be mindful that faith communities 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 faith community before the clergy departs. See, “Leave-taking Essentials” (Appendix C).

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

## SEVERANCE ARRANGEMENTS UPON RETIREMENT

From time to time a cleric announces their retirement, sets an end-date and works out an arrangement in which the faith community extends their 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.

The term “sabbatical” should not be applied to a priest who is ending a ministry. When a faith community has agreed to extend salary and benefits of a cleric upon their departure, they are agreeing to a severance arrangement with their clergy. The relationship has ended (severed) but an arrangement for additional salary and benefits for a short period may be granted.

On the rare occasion that a vestry agrees to a severance arrangement, the following Diocesan guidelines must be abided. 1) The cleric, the vestry and the faith community 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 faith community prior to receiving severance benefits. 2) The arrangement is never to exceed three (3) months. 3) Vestries must be able to show evidence that providing severance benefits will not adversely affect the ability of the faith community to move forward in mission.

## PROVISION FOR CLERGY LEADERSHIP DURING THE TRANSITION

Pursuant to the canons of The Episcopal Church, the Bishop, in conversation with the vestry, appoints a priest to provide clerical leadership. Depending on the particular needs and circumstances of the faith community, the bishop will generally appoint an interim priest with some training and/or experience in interim ministry. The goal is to help the faith community to address any systemic issues and to shape a call process for the faith community moving forward. An interim is a particular ministry, not a holding pattern.

The appointment of a Priest-in-Charge is an alternative approach, in certain circumstances, especially when the position is less than full-time. This process is entered into after conversation with the Canon to the Ordinary and Bishop. There are two approaches to this ministry, generally set for a period of two to three years. One is that the Priest-in-Charge has a clearly defined “term”—like an extended interim period, where the cleric is not eligible to be called as Rector. Alternatively, the Letter of Agreement can be set up so that the Priest-in-Charge may be called as Rector after three years. (Under no circumstances is a full search process begun with a Priest-in-Charge in place who

then becomes one of several candidates for the position of Rector.) See “The Interim Priest Program” (Appendix G) and “The Priest-in Charge Option(Appendix H).

Calling new clergy is a process of mutual discernment, engaged in by the faith community and the clergy candidates, in partnership with the Bishop and the Bishop’s Office. This exciting time of seeking the best clergy match for a faith community should be carried out prayerfully and with faith. Each step of the discernment requires a commitment of time and resources by God’s people deeply rooted in prayer.



## PHASE II: FOCUSING THE SEARCH PROCESS

### INITIAL MEETING WITH CANON TO THE ORDINARY

The Canon to the Ordinary meets with the vestry shortly after the faith community has announced that their priest will be leaving. The priest is not present at this meeting. The Canon to the Ordinary works with the community at this initial stage to establish a strong partnership with the Office of the Bishop, and to be of service to the faith community's leadership. The conversation at this meeting is focused on Faith Community Vitality (including mission and financial health), the conditions of the building, website, and the nature of the search process. An excellent self-assessment tool for discussing faith community vitality (or viability) is the Thriving Congregations Matrix (Appendix I).

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 J). 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 faith community has a rectory, there should be an honest assessment as to the conditions of the rectory. Consider having your first vestry meeting in the rectory after the priest leaves!

### FINANCIAL CONSIDERATIONS

It is the responsibility of the faith community 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 faith community, 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 advertised position for next three years without invasion of investments/endowments
- Past and prior year audits performed and filed with the Diocese
- Timely and complete submission of faith community's parochial report
- Acceptance of and payment of diocesan assessment
- Faith community 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 faith community be "above-board" and transparent about the compensation offered. There are diocesan guidelines to be followed in setting the financial terms. Diocesan policy requires that any full-time parochial priest must be paid at least the minimum total clergy compensation as determined by Diocesan Convention, but with a strong preference toward the midpoint of the range. See the Diocesan website for current guidelines or contact the Office of the Bishop.

### DIOCESAN REQUIREMENTS FOR CONDUCTING A CLERGY SEARCH

All searches in the Episcopal Church in Western Oregon are undertaken on a non-discriminatory basis. It is expected that the Search and Profile Committee will read and abide by the Anti-Bias statement from the Office of the Bishop (See Appendix K).

## SEARCH PROCESS FOR A RECTOR (AS OUTLINED IN THIS DOCUMENT)

While every context is a little bit different, the process is expected to last from 12 to 15 months. The length of time to complete any given stage depends upon many variables, including the frequency of meetings, willingness of members to work independently and collaboratively, issues that need to be addressed (e.g., financial challenges or resolving conflict), and the length of time needed to develop consensus about the future direction of the faith community and then write the faith community's profile. The goal is to achieve a balance between efficiency and a pace that encourages thoughtful discernment and thoroughness. Inevitably someone will observe that major corporations can move faster than the Church in replacing CEOs. Perhaps. But this decision should not be for a small group of insiders. The opportunity for the entire faith community to get a clearer sense of mission and vision is part of this work if the goal is to find the right match of a rector who has the gifts for the next chapter in a faith community's life together.

## PHASE III – SELECTING AND COMMISSIONING THE PROFILE AND SEARCH COMMITTEES

The Profile and Search Committees serve very different, complementary roles as appointed sub-committees of the vestry, and they require different skills. A member of the vestry may serve as a non-voting member on each committee, and sometimes the chair of the profile committee may serve as a non-voting member of the search committee, and the chair of the search committee may serve on the profile committee. The wardens are ex-officio members of both committees (as they are of all vestry sub-committees), but they do not have to attend meetings and they do not take part in any deliberations.

### FORMATION

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

### PROCESS

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

### THE PROFILE COMMITTEE

Five to six persons are assigned the task of working with the Transition Consultant and the faith community to create listening events toward the goal of telling the faith community's story. This group needs to be able to facilitate a process—not huddle together to unite in a closed room. This is the opportunity for all to be heard. One vestry member should serve as liaison to this group.

### COMPOSITION OF THE PROFILE COMMITTEE

Typically, the Profile Committee is comprised of 5-6 members that together have the following skills:

- Technological skills for creating and designing virtual documents, updating the website, and creating forms
- Writing skills for being the first writer and editor of various sections of the Profile and for being 'scribes' for the listening sessions
- Historical knowledge of the faith community, for finding and evaluating of historical sources, prioritizing and incorporating them
- Analytical skills for interpreting survey data, and responses to faith community listening sessions

### THE SEARCH COMMITTEE

Faith community members may be invited by the vestry to submit their names and other members' names for consideration in the formation of a Search Committee by the vestry. The composition of the Search Committee should reflect the faith community's diversity, including people of different ages, race, gender, and from various committees and areas of faith community's life. The members of the Search Committee should principally be those who are ca-

pable of assessing the knowledge, ability and skills of the candidates. The vestry should attempt to select people with open hearts and minds who will be sensitive to the culture and dreams of the faith community as a whole. Openly disaffected persons are not helpful to a search committee, nor is it ever appropriate for a member of the faith community's staff to serve on a search committee. It should be made clear to the faith community 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.

## COMPOSITION OF THE SEARCH COMMITTEE

The chair of the search committee ought to be appointed by the vestry. The senior warden should not serve on the Search Committee since all their energies should be devoted to keeping the church going during the interim period.

A good target number for the Search Committee is 5-8 members. One member of the vestry (and never more than two) may serve on the Search Committee as a non-voting liaison(s) to the vestry. This serves the purpose of keeping members of each body informed and "in synch" with the entire process. Vestry liaisons are not part of the search committee's discussion of candidates and do not participate in interviews.

Here are some desirable characteristics for all committee members:

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

## THE VESTRY'S CHARGE TO THE SEARCH COMMITTEE

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

## THE COMMISSIONING OF THE SEARCH COMMITTEE

The vestry commissions the members of the Profile and Search Committees with the responsibility of first, presenting an honest profile of the faith community's mission and ministry, and second, discerning with candidates who might be the next rector of the faith community and presenting names 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 faith community. See "Sample Liturgy for Commissioning Search Committee" (Appendix L).

## THE TRANSITION CONSULTANT

The Transition Consultant will act as an advisor and support to the Profile process and the launch of the Search process. This person will be well-versed in this guide and be able to help the Profile Committee in particular, as they figure out how to gather information from the congregation and tell the story of who they are and what they are seeking in the Profile. Each congregation will pay the consultant directly at a cost of \$500. This amounts to about 10

## PHASE IV: SELF-STUDY AND THE DEVELOPMENT OF A FAITH COMMUNITY'S PROFILE

### SELF-STUDY

All searches in our diocese begin with an inquiry into the ministry and mission of the faith community itself. The Transition Consultant from the Office of the Bishop can provide some tools to accomplish this task. The Profile Committee will:

- Outline the process ahead and address questions and concerns.
- Develop an understanding of the church's history, mission and goals.
- Develop an understanding for the values of the faith community, what excites them about their faith community, what they understand to be God's preferred future for them, and an honest narrative of where they currently are.
- Engender a sense of considerable excitement and optimism for the future of the faith community, to create support and enthusiasm for the call process, and to help fertilize the work of the faith community's profile.

### PREPARING YOUR FAITH COMMUNITY'S PROFILE

This process including the Self-Study and the completion of the Profile should take no more than 90 days. Following the self-study process, the Profile Committee will begin to work on preparing a Community Profile. This product, a "story" of the faith community has changed a great deal with technology. Essentially, there is no longer a need for an 8.5 x 11 glossy booklet. The story is told through your website. This is an opportunity for faith community's, even before beginning this work to update their website as a key way of sharing their story alongside of the faith community's profile. Help is available from the Director of Communications for this work. We strongly urge the faith community to get their website "up to speed" as they work on their profile. Together these will describe the uniqueness of the faith community, focus on its story, and describe the mission and ministry of the faith community itself. It should also describe the passions and gifts for ministry it is seeking in its next priest.

Equally important, is to ensure that up-to-date and accurate faith community financial information, as well as the elements of the clergy compensation/benefits package, be made available for inclusion in the faith community's profile. A hard copy profile should be no more than 10 pages and should be accessible through the website.

The completed profile must be sent to the vestry for approval and then to the Canon to the Ordinary, who gets the final approval from the Bishop, before going to final publication. Examples are available from the Canon to the Ordinary.

The description of the faith community presented is meant to be a realistic (not aspirational) representation of the community of faith on which the wardens, vestry, search committee, and faith community agree. In the experience of discernment, reflection, collaboration, and self-definition, a faith community "grounds itself" in its own reality rather than delineating the projected abilities of a new priest. The more honest and transparent a faith community is in telling its story, the greater chance of attracting appropriate candidates and the less opportunity there is for disillusionment following the call. See "Faith Community Profile Outline" (Appendix N).

### PREPARING YOUR FAITH COMMUNITY OTM PORTFOLIO

In addition to the Profile, the Profile committee is asked to assist the vestry in preparing the faith community's OTM Portfolio. OTM stands for The Office of Transition Ministry, a ministry of The Episcopal Church assisting

faith communities and clergy in transition. The Office of Transition Ministry maintains the database of all faith communities and clergy in the church discerning a call to new ministry. (Think of it as “Match.com” for faith communities and clergy.)

The OTM Portfolio includes information that you would have readily at hand from your Parochial Report (i.e. basic faith community’s data, average Sunday attendance etc.), your faith community’s profile, and perhaps even your Annual Report or faith community’s strategic plan if there be one. Your OTM Portfolio includes information such as names of former rectors and the compensation offered for the new position. Your Portfolio will help us to identify quality candidates who you will want to invite into your search process. A template for your use is found in the appendix. See “OTM Portfolio Template” (Appendix O). Please fill out the form and the Narrative Questions and return the completed document to the canon to the ordinary with your profile so it can be posted to the OTM database.

## A PRAYER FOR OUR SEARCH PROCESS

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

The Book of Common Prayer, page 818

The prayer above is only offered as a sample or template. One of the first things a vestry can do together is to work on their own prayer, developed for the entire faith community and prayed at every gathering for worship, vestry meetings, and ultimately search committee meetings. Invite a spirit of thoughtfulness, collaboration, and faith-building. Please don’t write a “where’s Waldo?” prayer that suggests there is but ONE candidate out there whom God has already “chosen” and your job, therefore, is to go out and identify that person. Rather, your work is to become the faith community God is calling you to be—so that any number of suitable candidates can better get to know your gifts and challenges toward the goal of offering their gifts in mutual ministry going forward. Many committees ask that a member of the committee act as their “chaplain” to help keep them spiritually grounded by beginning and ending meetings with prayer and encouraging the use of the Faith Community Search Prayer by the faith community throughout the transition period.

## PHASE V: THE SEARCH PROCESS

Once your faith community's profile is complete and posted on your vibrant up-to-date website and the OTM profile has been completed, with the bishop's permission, you are now ready to begin receiving names and accepting applications. Our diocesan website will include a direct link to your website that also indicates that your faith community is now "receiving names." Your consultant can recommend other ways to advertise your opening including advertising in the Episcopal News Service: [episcopalnewsservice.org/submitjob](http://episcopalnewsservice.org/submitjob).

Clergy Candidates who are applying to your faith community will be sending materials directly to the Canon to the Ordinary who will, in consultation with the Bishop, prepare a list of names to pass along to the Search Committee. Before this list is given to the Search Committee, red-flag checks and Bishop to Bishop phone calls regarding the candidates will have been completed.

The Transition Consultant's work is concluded once the list of candidates' name is provided to the Search Committee.

Names are received from the following sources:

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

### COMMUNICATION AND CONFIDENTIALITY

#### **Communication with the faith community is essential.**

While the conduct of the deliberations and the names of nominees must remain confidential, it is important to communicate on a regular basis the progress of the process. See "Communicating with Clergy Applicants" (Appendix P).

#### **Confidentiality is not secrecy.**

Faith communities must be assured that the transition period is being well managed and that progress, however seemingly invisible, is being made. Otherwise, the members may complain that "nothing is happening." The chair of the search committee should therefore give oral updates during announcements or faith community functions. If new members are elected to the vestry in the course of the search process, it is important to bring them up to date on the status of the process.

Members of the search committee should understand how important it is to **maintain confidentiality** as often prospective candidates have not yet informed their own faith community that they may be in search. For search committee members to do otherwise is to risk great damage, both to the candidates and to their faith communities. It is very harmful to the integrity of the process if a search committee member "leaks" information to anyone in the faith community, including a spouse or other family member during the course of the search process. Equally important is to provide for the security of search committee files throughout the process. The diocese expects that all parties in the search process will respect confidentiality. The faith community is not to make public the names of candidates and the candidates should not make public the church where they are interviewing. This includes, but is not limited to, social media. See "Transition/Interim Communications" (Appendix Q).

## NARROWING THE FIELD OF CANDIDATES

Once the period for receiving names has passed, the search committee's task is now to sort through the candidates' materials efficiently and yet not arbitrarily, to the end of narrowing the field to a "short list" of 1-5 serious candidates. Eliminating candidates on the basis of the clergy OTM Portfolio alone is not a recommended practice.

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

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

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

During any stage of the screening process, if interviews are conducted, all candidates on the list must receive the same "type" of interview.

Once the list is reduced to 1-3 names, these names are passed along to the vestry for final, in person interviews. See "Interviewing and Various Sample Questions" (Appendix R).

This would also be the time to review the Faith community's financial status with the candidates by sharing your most recent financial records and by reviewing the faith community's income streams (e.g. long-term rentals, etc.). It is important for the candidates to have a clear picture of the church's financial stability at this time in the process. Further, the detailed clergy compensation package should also be shared and discussed.

## ON-SITE VISITATIONS

In times past, search committees almost always visited candidates in their current assignments. For a number of reasons, the benefits of this practice are in dispute. First of all, only a representative few from a search committee are able to attend such visitations (especially if there is significant travel), thus relying on the insights of a few rather than the whole. Secondly, there is potential for search representatives to become distracted by the dynamics of the faith communities that they are visiting and therefore losing focus on the candidate. Third, the context of each faith community will differ (some will be in large vibrant faith communities, others small, and some between calls).

Some would argue that a more level playing field for all is in your faith community; ultimately that is where your candidates will need to fit in and this provides the same process for all, and all the members of the committee can participate. It is increasingly easy to watch and listen to sermons and not just read them and this practice is strongly encouraged.

## NOTIFYING CANDIDATES WHO ARE NO LONGER UNDER CONSIDERATION

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



## PHASE VI: THE CALL OF A NEW RECTOR

### THE VESTRY'S DISCERNMENT WITH THE CANDIDATES

Once the search committee comes to consensus on which candidates it wishes to recommend calling as the next rector of the faith community, the names are presented to the vestry for consideration and a vote of approval. Normally, the search committee will present a final report to the vestry outlining how the gifts for ministry match the faith community's goals. See "Sample Handoff Memo from Search Committee to Vestry" (Appendix S).

### BACKGROUND CHECKS

Once the search committee has given the vestry the names of the final candidates, those names must be reported to the Canon to the Ordinary so that a full background check on each candidate may be initiated. Oxford Document 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 Episcopal Church in Western Oregon.

All finalists must have complete background checks. This differs from the preliminary background screening performed by the Bishop's Office, which simply ensures that candidates are priests in good standing. The time needed to complete this 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 background check company has received the signed forms from both the candidate and the Office of the Bishop. The names of the finalists should be forwarded to the Bishop's Office as soon as possible so that the background check can be initiated at the earliest possible moment.

The faith community is responsible for the cost of background checks, which vary depending on whether the candidate has previously completed a background check for the Episcopal Church in Western Oregon.

### BISHOP'S MEETING WITH FINAL CANDIDATES

In addition to initiating the background checks, the wardens will contact the Bishop's Office to schedule a meeting between each of the candidates and the Bishop. This is normally done during the candidate's visit to the faith community for the personal interview with the vestry. However, the meeting can take place prior to the in-person interview or immediately following. 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. (These can also be done on Zoom when that is easier to manage.) The Bishop must talk with the finalist *prior* to a final vote by vestry.

### CANDIDATES MEETINGS WITH THE FAITH COMMUNITY

A typical visit would include an opportunity for the candidate to celebrate Holy Eucharist and preach (for the vestry, not the entire faith community) and have an opportunity to share how their experience would help the faith community meet its goals for the future. This would also be a good moment for a tour of the area. Prior to all of this the wardens and treasurer meet informally to review a proposed Letter of Agreement and to answer any questions the candidate may have about the faith community. 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 faith community's profile, candidates are acquainted generally with the financial terms the faith community may offer, but during the final interview states discussion of the financial package and the general financial status of the faith community must take place. Candidates coming from outside the diocese should particularly be made aware of the cost of living and any other unique opportunities and challenges of the geographic

area. See “Ground Rules for Finalists’ Visits to Faith communities” (Appendix T).

## ELECTION OF A RECTOR

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

## THE LETTER OF AGREEMENT

Details regarding the rector’s terms of employment (amount of cash stipend, housing arrangements or allowance, moving expenses, benefits, and description of responsibilities) are negotiated with the vestry and/or wardens, and are later spelled out in a formal Letter of Agreement that is concluded between the faith community and the clergy person who has been called.

The Letter of Agreement is drawn up for signing by the new rector and the vestry, and then sent to the Bishop for final review and signature. Please see “Worksheet for a Letter of Agreement,” (Appendix V).

## 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 Office of the Bishop. The Office of the Bishop may share information from this report with the consultant. 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 faith community’s archives. See “Some Thoughts as the Search Committee Winds Down” (Appendix W). Successful completion of the work of the search committee is also cause for celebration, either in the context of the faith community or simply by the committee itself.

Recognition of the ministry of the Interim Priest and bidding them goodbye merits the attention of the faith community at the end of the transition period. See “Sample Farewell Liturgy to Interim” (Appendix X). The Office of the Bishop also encourages an exit interview with the departing Interim Priest.

## PHASE VII: PREPARING TO WELCOME THE NEW PRIEST

### WELCOME

When the call has been issued and accepted, it is appropriate for the vestry to turn their attention to welcoming their new rector. They will assist in the beginning of the new ministry. They plan coffee and dessert for small groups to assist the new rector in meeting people, consider providing groceries or gift cards to local restaurants for the first week (particularly if the new clergy is relocating to the area) see to it that the rector's office is ready to be occupied, and provide maps and contact information. See "Welcoming the New Rector" (Appendix Y). It is also important to notify the MTC of the start date so that they may welcome the new rector as well.

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

### ONBOARDING

#### What is "onboarding"?

In secular institutions, "onboarding" refers to the processes in which new hires are integrated into the organization. It includes activities such as the initial new-hire orientation process, as well as learning about the structure, culture, vision, mission and values. In the life of a congregation, onboarding a new rector or priest-in-charge is a mutual process that involves the new clergyperson as well as the vestry, staff, and the whole of the congregation. To begin well is to set the tone for your life-giving work.

Onboarding is often confused with orientation. While orientation is necessary for completing paperwork and other routine tasks, onboarding is a comprehensive undertaking. We offer these guidelines for onboarding as a holy and intentional process to enrich the advent of your mutual ministry.

#### The basics: for the new rector/priest-in-charge

Some things to consider before you begin:

- Social media can be an effective way to communicate with your new community. Be proactive in communicating your preferences using the following guidelines. See "Social Media" (Appendix Z) for social media guidelines.
- There are many arrangements to be made such as housing, new doctors, etc. The transition team can be a great resource for referrals yet it's incumbent upon you to decide and communicate your policy about doing business with parishioners. Be clear and upfront.

In your first few weeks:

- Express frequent gratitude. Begin with thanking the search committee, vestry and transition team. Write thank you notes, birthday and anniversary cards.
- Be a proactive communicator. Be wary of the slant in the stories people tell you. Be vigilant in watching for triangulation.
- Prepare for the Celebration of New Ministry: create a team of congregational leaders and staff who will coordinate with the Bishop's Office. Consider including community partners and interfaith leaders in the celebration.

- Focus on building key relationships before taking on changes to the system and culture of the parish. Getting to know people can be overwhelming, so prioritize key relationships with members of the Staff, vestry and key committee/ministry leaders.
- Schedule regular check-ins with the people who report directly to you. Review their job descriptions, ask clarifying questions and invite input.
- Find a ministry coach/mentor outside your system.
- Ask your vestry or transition team about hosting small gatherings at which you can invite input from the congregation. Resist the urge to “outline your vision for the future. Rather focus on listening.
- Do some sleuthing: discover the last ministry program, event or start-up that the congregation seems to universally appreciate. Get below the surface and find out why.
- Get to know the neighborhood and congregational partners.
- Take time for prayer, days off, contemplative retreats, continuing education, family time and vacations. Clear boundaries benefit the whole body.
- Check with the Bishop’s office about expectations for newly ordained, first-time-in-charge, and new-to-the-diocese clergy including participation in the Thriving Leaders program (formerly known as Fresh Start).

## CELEBRATION OF NEW MINISTRY

It is customary after the arrival and settling in of the new rector for the faith community to schedule a Celebration of a New Ministry. The liturgy found in *Enriching our Worship* is used. Since the Bishop preaches and presides at this liturgy, contact the Bishop’s Executive Administrator to schedule. In the rare event where the Bishop is unavailable, the Bishop may appoint the Canon to the Ordinary to preach and celebrate.

Please coordinate with the diocesan Director of Communications to publicize the service. Please remember to invite the clergy of the diocese to participate as appropriate. It is a good way for the new rector to meet their fellow colleagues in ministry as well. We encourage also the invitation of those people who have been helpful throughout this process, including the Transition Consultant, the Interim Priest, and any clergy who have served the faith community during the transition period. This liturgy marks the official end of the transition period.

## CONCLUSION

The new rector is in place, at last. This is in itself, a significant accomplishment. But hopefully, it is not the only benefit a faith community has received from its involvement in this season of transition. Much of a faith community’s involvement and benefit depends upon the extent and enthusiasm of lay participation and that, in turn, depends upon the leadership of wardens and vestry.

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

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



## APPENDIX A: LIFE CYCLE OF ORGANIZATIONS MODEL

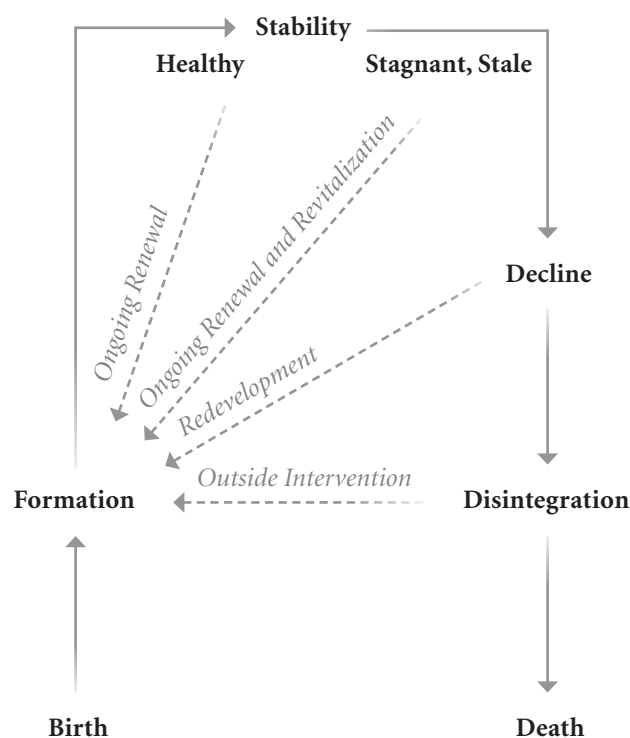


FIGURE A-14: MODEL 5—LIFE CYCLE OF ORGANIZATIONS

**Birth:** A founder or founders, an idea, a dream

**Formation:** Identity—who are we (at the faith level)? what are we here for? who is our neighbor, and how are we related to our neighbor?

**Stability:** Fruitful and sustainable ministry, institutionally and spiritually. A time when the elements of organizational life fit together (money, vision for ministry, property, people). Stability can be a **place of health** or can tip into feeling **stagnant or stale**, with growth stalling and new opportunities being ignored. This tip is sometimes experienced as a membership plateau followed by declining numbers.

**Decline:** Characterized by a fall-off in numbers; decline in energy; fear, blame, and confusion in the system; a focus on small things rather than central issues

**Disintegration:** Marked by conflict, hopelessness, feeling stuck, inability of internal leaders to affect change

—Adapted from Alice Mann’s *Can Our Church Live? Redeveloping Congregations in Decline*

## Congregational Renewal and Redevelopment

*“The hour has come for the Son of Man to be glorified. Very truly, I tell you, unless a grain of wheat falls into the earth and dies, it remains just a single grain; but if it dies, it bears much fruit.”* —John 12:23–24

### Healthy Stability and Ongoing Renewal

Healthy, stable congregations stay healthy either through leadership that instinctively raises and acts on formation-related questions in the overall congregation or through processes that continue to renew the entire congregation or important parts of the congregation that need attention. Some leaders organically recognize and act on areas in a congregation that need improvement; some leaders and congregations have in place processes that scan the life of the congregation and listen for and act on areas that need improvement.

### Stale, Stagnant Stability and Renewal/Revitalization

When stability becomes stale and stagnant, the necessary work for renewal and revitalization is typically system-wide. A congregation and its leadership will need to look in a more focused way at formation questions of identity, purpose, and context—Who are we? What are we here for? Who is our neighbor? When done skillfully, these interventions also introduce and teach the congregation language and models or frameworks that help to focus the discussion. Sometimes the self-study before the calling of a new vicar/rector can be the context within which at least some of this work is done.

### Decline and Redevelopment

The further down the path a congregation goes in declining numbers, finances, energy, and flexibility, the more costly it becomes for a congregation to engage the formation questions that have the potential to activate what it will take to return to healthy stability. Redevelopment is a possibility when serious declines have occurred in a congregation, but significant effort will be needed to increase the likelihood that redevelopment efforts will bear fruit. Often third-party help or a dramatic change in leadership is needed to face the situation, to let go of old patterns and ways of doing things, and to engage the work needed to turn things around.

### Disintegration and Outside Intervention

When disintegration begins and things start to fall apart, conflict or paralysis can set in. At this point, a diocese will often intervene, taking charge of the decisions since the congregation has no internal capacity to do what may be needed.

## APPENDIX B: RESPONSIBILITIES OF TRANSITION TEAM

The Transition Team oversees the overall health of the clergy and faith community in the interest of a life giving and positive transition time. The Transition Team helps keep things moving along and assists with communication. The time of transition is an especially important time in the life of a faith community. Recognizing that this can be a time of anxiety and uncertainty, the Transition Team should act as that calm reassuring voice that combines empathetic listening with patient understanding. It should also have a sense of what issues need to be addressed and then channeling that vital information back to the 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. In many cases, if there is a clear sense of who will chair the Profile and Search Committees it can be made up of the two wardens and the two chairs, and perhaps one or two others.

### **The Team's specific tasks include:**

- Provide support for whatever Clergy may be present. This means the departing Rector, the Interim, the new Rector and their families.
- Coordinate celebrations and thanksgivings for the ministry of the departing Rector including the final service.
- Monitor the transition process, which means interacting regularly with clergy, vestry and faith community 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 persons 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.
- Prepare ways of welcoming and orienting the new Rector and their family to both the faith community and the community, including social events, small gatherings in people's homes, showing the new Rector where the stores, schools and medical services may be found. See “Welcoming the New Rector” (Appendix Y).
- Educate the parish on best practices for social media contacts with the new clergy and their families. See “Social Media” (Appendix Z).



## APPENDIX C: LEAVE-TAKING ESSENTIALS FOR CLERGY

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

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

### COMMUNICATING YOUR DECISION

Assist the wardens with writing a letter to the faith community that outlines your plan for leaving and assures them that they will have support and guidance from the Office of the Bishop through the transition.

Develop an agreement with the vestry and let the faith community 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.
- Please don't "blame" this on "The Diocese" or the Bishop. The fact is that a faith community can only have one rector at a time. Treat your successor the way you would like to have been treated when you arrived. They need to say goodbye to you before they can say hello to that person.

### PREPARING TO GO

- Schedule an exit interview for yourself with the Bishop and the Missioner to Thriving Faith Communities.
- List all your current responsibilities, assigning a hand-off date, and designating a specific person to take up that task.
- With the Wardens, review all leadership positions, clarify roles and responsibilities. Update job descriptions for paid staff.
- Meet privately with individuals with whom there may have been tension or conflict.

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

## ORGANIZING FOR YOUR SUCCESSOR

- Review with the Wardens and Vestry their leadership responsibilities for property, finance, and administration during the transition.
- Identify those in nursing homes, assisted living facilities, and homebound, noting who expects to be visited and with what regularity.
- Note significant pastoral concerns such as premarital counseling, pregnancies, divorces in process, terminally ill, and the bereaved, remembering to maintain confidentiality of matters that are pastorally sensitive.
- Note pre-planned funeral arrangements and where the information is filed.
- Prepare a calendar for the upcoming year, including Episcopal visitations, homecoming, patronal feasts, sunrise services, graduations, every member canvas, stewardship, and annual meeting.
- Leave clear instructions about your faith community's participation in community or ecumenical services, as well as their expectations about preaching and hosting future events.
- Balance the discretionary fund and turn it over to the Wardens.
- List any special funds, their purpose, use and signatories, including scholarships and other financial commitments.
- Prepare a file of audits, parochial reports, annual reports, and copies of budgets for three years. Identify the location of the safe and who knows the combination.
- Identify the location of the bank deposit box and who has keys.
- Make sure faith community's lists and service registers are up to date.
- If you are an administrator for a church website or Facebook page—pass these responsibilities along (and remove yourself).
- Preserve historic documents.
- Clean out personal files. Keep what you need and carefully dispose of the rest. Prepare a file of service leaflets for the past three years.
- Prepare a file of lay reader certificates, lists of current altar guild members, ushers, acolytes, and servers with contact information (phone numbers and email addresses).
- Describe unique faith community's 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, chrisms, last year's palms, the nativity set, etc. Take out the trash. Throw away clutter that accumulated for rummage sales in closets, storage areas, or garages.
- Leave a notebook. Not a 'how to' but a 'where to.' Where to get a decent haircut, find a dentist, order Chinese takeout.
- Create a contact list of faith community's leadership, including roles and email addresses. Turn in your keys, clearly tagged.
- Change your email address. Make sure lay leaders have codes for the faith community's social media, etc.
- Establish a date certain for moving out of church-provided housing, and agree on conditions or repair and cleanliness.
- Encourage and emphasize hospitality for welcoming new clergy and their loved ones. Let people say goodbye, thank you and give you their blessing.
- Assist wardens in making arrangements for temporary emergency pastoral coverage immediately following your leaving.
- Don't leave anything for the next priest. If it needs to be done, do it. Too many arriving clergy are sunk by things left undone.

## RELATING AFTER YOU LEAVE

- Arrange for change of address and mail forwarding.
- After your last day, do not return to the office to check for mail, email, or phone messages.
- In all cases, the responsibility belongs to clergy leaving to make clear that the pastoral relationship has ended.
- Never be involved with the search process including giving names or offering opinions about candidates.
- Avoid getting triangulated with members of the faith community and your successor.
- Be clear that it is not appropriate for you to discuss any faith community business after you leave. Make plans to worship with another faith community.
- In the absence of a rector or interim priest, the Wardens are canonically responsible for the worship, finance, property, and administration of the faith community.
- Remember, you have no official or canonical role in the faith community you leave, and your priestly, pastoral, and administrative functions end on the effective date of your retirement or resignation.

## RESOURCES

- *Oswald, Roy M., Running Through the Thistles. Rowman and Littlefield Publishers, 1998*
- *Weese, Carolyn and Crabtree, Russell, The Elephant in the Board Room. San Francisco: Jossey Bass, 2004*
- *White, Edward A. Saying Goodbye: A Time for Growth for Faith communities and Pastors. Alban Institute, Inc. 1994*
- *Church Pension Group website at <https://www.cpg.org/>*

## APPENDIX D: EXIT INTERVIEW WITH THE BISHOP AND CANON TO THE ORDINARY

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

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

- Describe the three greatest strengths of the faith community.
- Describe the three greatest/most urgent challenges or concerns.
- What, if anything, needs immediate attention or special support?
- What was the last major decision of the leadership? Who was involved and how was consensus reached? (Or wasn't reached?)
- How would you describe the spiritual health of the faith community?
- How is the faith community participating in God's mission of restoration and reconciliation? (Describe how the faith community relates directly to the community in which it is located.)
- How would you describe the financial condition of the faith community?
- 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 faith community maintain or support?

### RECTOR'S EXIT INTERVIEW WITH FAITH COMMUNITY'S LEADERSHIP

#### **Faith community Policies**

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

#### **Staff and Lay Ministers**

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

#### **Pastoral Needs**

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

- Name of any particular pastoral routines, prayers, ministries in the faith community (include helpful details: date/time/place/etc.)
- Do you hold services in community nursing homes? If so, which ones?
- Who are the sick and shut-ins?

- Who will need pastoral attention during the first few weeks of the interim period?
- Are there other members of the faith community who will need special attention?

### **Additional Information**

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

- Name the key components to what has served your ministry well over the course of your time as rector.
- Name one or two things that you would have liked to have accomplished but were unable.
- What will your successor need in place to help them 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 E: TO THE LAITY: SAYING GOODBYE WELL

Encourage all faith community members to be a part of the Farewell.

Some examples:

- Work with the Sunday School on a goodbye project
- Check in with vestry to see what's planned (maybe they need skit actors or someone to write a goodbye ditty for the Choir to sing)
- Bake a cake for the last coffee hour
- Be sure to attend the party and the last Sunday Service

The community may 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 Faith community marks the importance of your communal relationship with the outgoing priest.

At the final farewell, the vestry is responsible to line up appropriate speakers, in consultation with the priest.

A letter should be sent to the faith community from the wardens and vestry assuring the community about services, pastoral coverage, and the next steps in the Interim Process.

The Farewell Liturgy is the responsibility of the priest. The wardens should, however, be involved (either directly or through appointment) in the planning of the service.

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

## APPENDIX F: SAMPLE LITURGY FOR THE ENDING OF A PASTORAL RELATIONSHIP

*From the Book of Occasional Services*

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

**Departing Minister:** On the \_\_\_\_\_ day of \_\_\_\_\_, I was inducted as Rector of \_\_\_\_\_, \_\_\_\_\_, Oregon. 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 faith community ends this day. Mindful that the call to serve God is a call that comes in prayer, I now pray:

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

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

**Representative from the Office of the Bishop (if available):** N. (Departing Minister) the work of ministry is rooted in the gifts of ministry. The people of this faith community 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 faith community 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 faith community's 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 they have 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 Faith community:** O God, you have bound us together for a time as priest and people to work for the advancement of your reign on earth in this place: We give you humble and hearty thanks for the ministry that we have shared.

*Silence*

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

*Silence*

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

*Silence*

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

*Silence*

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



## APPENDIX G: INTERIM PRIEST PROGRAM IN THE EPISCOPAL CHURCH IN WESTERN OREGON

The Interim Priest is trained to assist faith communities 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 faith community for an exceptionally long time or there has been significant organizational or pastoral difficulty in the faith community. It is an intentional ministry of sustaining the direction and ministry of a faith community 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 faith community 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 faith community while the faith community leaders focus on the call of a new rector.
- Deal with any internal conflicts and help heal any divisions within the faith community.
- Lead the faith community and sustain and build relationships within the faith community, with the community, and with local ecumenical clergy.
- Lead the faith community to explore possibilities for new ministry that the faith community has long contemplated but not yet initiated.
- Help the vestry, lay leaders, and staff make such changes as may be needed to align with the community's life and administration with generally accepted standards in the diocese. These might include updating membership records, licenses, and certifications for *Safe Church, Safe Communities* and liturgical leadership.

### SELECTION OF THE INTERIM PRIEST

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

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

## INTERIM RESPONSIBILITIES

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

The interim shall:

- Work with the vestry and other lay leaders to maintain the regular schedule of worship services and preaching, education, pastoral care and pastoral offices (weddings, funerals, and baptisms), calling upon the sick and shut-ins, visiting newcomers, and ongoing administration of the faith community.
- Supervise all 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 interim shall communicate regularly with the MTC in the calling process, but shall not work with the search committee as they solicit and screen candidates. The interim priest shall not under any circumstances be eligible to be a candidate for rector.

## APPENDIX H: PRIEST-IN-CHARGE OPTION IN THE EPISCOPAL CHURCH IN WESTERN OREGON

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

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

- The faith community 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 faith communities
- The necessary financial support for hiring new clergy is lacking and needs to be addressed
- The faith community would benefit from a period of stable and consistent ministry before it turns its attention to a search
- The faith community 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 faith community's input, a brief profile describing the faith community, what ministry and skills it seeks in a PIC, and what it will offer to the PIC (e.g., total compensation, administrative support, its own gifts and skills).

### SELECTION OF THE PIC

- The Bishop's office will identify possible candidates from among qualified candidates for the position. Recognizing that the interim time is a period of intentional transition and change, and that a priest specifically trained in interim ministry (or with commensurate skills and experience) is the best person to accompany a faith community through this transition, it is not customary or desirable that a current assistant or associate be appointed as PIC.
- 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 vestry conversation (greet/meet) and/or a visit by a small group to observe the clergy at the faith community being served by them. The process is not intended to mirror a "rector search." The candidate(s), therefore is not subjected to a prolonged "approval" process by the faith community.
- If the vestry and the candidate agree, a Letter of Agreement (LOA) setting forth the mutual obligations and responsibilities of the PIC and the vestry is negotiated. A standard PIC LOA is available from the Bishop's office and at the diocesan website.
- The appointment is official upon the approval of the LOA 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 faith community.
- A time for mutual ministry review by vestry and clergy must be set forth in the covenant of ministry.
- With the approval of the Bishop, a PIC may be considered as a candidate for rector following a period of mutual discernment (mutual ministry review) undertaken after two full years. The PIC may not be considered as a candidate for rector once a formal clergy search is undertaken, however. In other words, after two years the three partners—Bishop, vestry, and priest—decide through a mutual discernment process whether there is a call to serve as rector. If that answer is yes, no further search process unfolds. If the answer is no, a search process begins with the PIC serving the remaining time as an “interim” to prepare for the next rector.
- In some, rarer cases, a three-year PIC is appointed without the possibility of being called to serve as rector.

## STAGES DURING THE PIC PERIOD

Although each faith communitul 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:

- **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
- **Working Stage:** Working on identified ministry priorities; building trust; developing confidence in working together, using mutual ministry review to evaluate progress
- **Discernment Stage:** Vestry/faith community and clergy are visioning/discerning in relation to one another. Vestry (or designated committee) is undertaking a period of intentional self-study:
  - Where are we?
  - What is our mission/ministry?
  - What kind of clergy leadership do we need/want going forward?
  - Is this PIC the right person to continue as Rector?

At the same time, the PIC is doing their own discernment about call to this faith community or to ministry elsewhere.

## MINISTRY OPTIONS FOR MUTUAL DISCERNMENT BY PIC AND FAITH COMMUNITY:

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

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

## APPENDIX I: THRIVING CONGREGATIONS MATRIX

Thriving Congregations & Communities (A Together Lab design adapted for our work)

These markers of Thriving Congregations & Communities are born out of on-the-ground relational work across the state over the past several years. We have discovered that communities can thrive at any stage of the life cycle, including death and rebirth. Below are the markers of thriving that we have developed together as a relational ecology:

**1. Reconciling; More Truthful Ancestral Stories:** The community is honest, consistent, and invested in uncovering and sharing ancestral stories about themselves, their community, and the land they steward that take seriously the systems that have impacted and formed them.

Examples: Sacred Ground, Doctrine of Discovery, Reconciling Racism

*Are you active in Reconciling work?*

**2. Healthy Practices; Authentic Mutual Relationships:** The community nurtures an inviting culture of courage, authenticity, consent, and belonging for one another's unique stories of pressures, resilience, and joy. They intentionally practice turning toward one another, rather than turning on one another.

*Do you have a Behavioral Covenant that you live into together?*

**3. Leader-full:** The community makes room for, activates, and accompanies new leaders at all decision-making levels, nurturing a culture of power-sharing and experimentation. Primary leadership's role becomes accompanying new leaders, weaving stories into a collective horizon, and building capacity for collective pathways.

*Are you consistently bringing in new leaders and forming lay leadership capacity?*

**4. Community Engagement and Outreach:** The community has a shared understanding of their values and how their current realities, capacities, limitations, and the interests of their immediate community align with those values. These are consistently re-evaluated in order to collaboratively discern and strategically inform decisions. Communities exhibit a courageous collective spirit of curiosity, experimentation, and iteration that are expressed in strategic, missionally-aligned risk-taking.

*Are we listening to the needs of our context and partnering with supportive organizations?*

**5. Prayer and Worship; Living Wisdom Traditions:** The integral relationship of people's stories, lineages, traditions, rituals, and collective spiritual practices make space for meaning-making and shape daily life, decision-making, and sacred public action.

*Does their worship provide space to be nurtured and renewed by our faith tradition?*

## APPENDIX J: SAMPLE BUDGET FOR SEARCH PROCESS

- Discernment Retreat \$500
- Oxford Background Checks (for three finalists @ \$140/each) \$420
- Final Candidates visit to the Faith community (3 finalists – airfare, lodging and meals) \$3,000
- Upgrades to Website \$1000
- Moving Expenses of New Rector \$10,000
- Celebration of New Ministry \$500

## APPENDIX K: ANTI-BIAS

The Episcopal Church does not allow discrimination in the ordination process based on race, ethnicity, gender or gender identity, marital status, sexual orientation, or age.

This article address the issue of subconscious, unintended bias in search committees in an academic setting. The experience is similar to what we often see in the Episcopal Church, so this article is offered as a stepping off point for vestries and search committees as they work to evaluate candidates.

### HOW SEARCH COMMITTEES CAN SEE BIAS IN THEMSELVES

Most hiring panels are designed to represent a diverse mix of people, yet they still bring with them hidden motives  
Katherine Streeter for The Chronicle Review

By Lucy A. Leske NOVEMBER 30, 2016

Questions about implicit bias are now part of most healthy, serious campus conversations — whether the topic is student admissions, campus policing, or faculty recruiting. These are critically important discussions to have, if only to cause every one of us to pause in our daily lives and consider the preconceptions and prejudices we may have.

One forum in which there is a need for continued exploration of bias is the leadership-search committee. In an effort to reduce bias and to ensure a diverse pool of candidates for leadership roles, institutions typically populate search committees with a mix of representatives — the idea being that diverse points of view and backgrounds will, among other things, bring implicit bias into the open and prevent it from coloring decisions.

The committees are inherently representative, but their members still bring with them hidden motives. With diversity of representation comes diversity of biases — about gender, race, age, body type, sexual orientation, dialect, accent, alma mater, hometown, degree worthiness, hairstyle, clothing. The list goes on.

#### **What don't we have biases about?**

Broad representation can work in a committee's favor as members question one another's rigidities about types of candidates. However, having a diverse committee does not necessarily ensure that all voices are welcome or heard, nor does it ensure that bias will be eliminated. Group dynamics like seniority and interpersonal relationships can dampen honest and transparent conversations.

Entire groups can also bring blinders to the table. Conscious or unconscious, bias is always present and a challenge to ferret out.

In more than 20 years of work supporting administrative-search committees, I have observed both overt and hidden bias surface in many forms. Let me be the first to say that I recognize that my own judgment and analysis are influenced by biases developed long ago through my own upbringing and experiences. It takes hard work and constant examination of criteria, openness to others' points of view, and a commitment to supporting each committee in its values to stay unbiased and offer good advice.

That I have seen bias creep into presidential or senior-level search committees should be no surprise, but it is always remarkable to hear it, nonetheless.

The challenge is identifying and recognizing when bias is affecting decisions, as well as figuring out whether to do anything to mitigate bias that works against the institution's mission, values, and strategic priorities.

Biases are also not evenly applied across all sectors and positions. A committee member may be entirely comfortable with the notion of hiring someone from an underrepresented group for an entry-level or professorial post, but have subconscious hesitations when the opening is for a senior administrator: Do I want this person representing my entire institution? What will people think?

For example, openly gay candidates may pass unremarkably through scrutiny for faculty roles by a committee focused on academic accomplishment and teaching skills but run into trouble for presidential positions where committees of mixed constituencies bring to the table biases about how presidents and their trailing family members ought to appear.

Likewise, women may get eager interest for midlevel staff positions in IT or finance but not be taken seriously as potential CIOs or CFOs. Interestingly, I frequently hear from women that they were advised early in their careers not to go after management positions but, instead, to take more interesting non-supervisory positions, a choice that reverberates later. I have seen committees eliminate fine candidates from consideration because of speculation that a résumé full of staff roles must mean the person is not a good manager.

Bias is equally insidious when hiring committees meet in person with candidates from underrepresented backgrounds. Implicit bias can award immediate credibility to candidates who fit the stereotypical mold — such as an applicant from a highly ranked university or a familiar organization. Their behavior may be less scrutinized than that of candidates from lower-ranked institutions or unfamiliar backgrounds. Studies have shown that candidates who fit a stereotypical model are less closely analyzed because their performance meets stereotypical expectations for that role. By contrast, unconventional candidates may perform at a similar or higher level in the job interview but are examined more closely because they do not fall within expectations.

As search consultants, despite some of our best efforts, it is an uphill battle getting committees to put their actions behind their words and show that they are truly open to diverse backgrounds. Bias clogs the machinery all the time. That said, there are ways we can minimize implicit bias. Sometimes it is as simple as asking committee members to take an Implicit Association Test from Project Implicit. As one of the project's founders, Brian A. Nosek, a professor of psychology at the University of Virginia, has said, "Gaining insight into the mental operations that lead behavior astray of values is a precondition for predicting, understanding, and controlling implicit biases."

Another approach gaining some ground in higher education is the use of assessment tools, particularly in high-level leadership searches. A search committee uses the tools to evaluate a candidate's competencies, values, and motivators without any details of the person's race, background, gender, or other such factors. The results are then compared with a larger database of executives who are high performers in the same sector.

Matching an applicant's competencies against what the institution is trying to achieve doesn't eliminate bias from decision-making, but it adds an unbiased method for evaluating a candidate's fit and leadership potential. These assessments are a little like the opaque screens used in orchestra auditions — they strip away all physical attributes, educational background, and employment history, and bring to the surface the very things that organizations need to succeed.

For search committees that want to ensure that bias is either brought to the surface or reduced, here are five questions they should consider before embarking on presidential and other leadership recruitments:

- What are our goals in regards to implicit bias? Can we recognize our own biases to a greater degree, and thus minimize or eliminate them to reduce their effect upon viable candidates? Can we incorporate them into our discussions around candidates as they move forward through the process?
- Which biases should we be on the lookout for? In addition to race, gender, and other common categorizations, are there additional (perhaps more subtle) biases that could affect the search?
- Which of those biases may be specific to leadership recruitment? Search committees should be aware that bi-



ases may crop up in senior administrative searches in different ways or intensity than in faculty or staff searches. The committee must guard against stereotyping around socioeconomic class, academic degrees, nationality, and professional experience.

- What methods and technologies are at our disposal? How do we test ourselves? (Do we use the Implicit Association Test? Or undergo bias training through a consultant?) Other questions to consider: Is our institution experimenting with software and other technologies designed to eliminate references to gender, race, and other identifiers — even academic credentials?

What about competency assessments? Are they effective in reducing biases, especially for senior-administrative positions?

- What's our plan? How do we take our newfound knowledge about implicit biases and use it to actually minimize those biases as we begin a search?

Implicit bias may rear its head at any stage of the hiring process, and it is essential that search committees acknowledge that and ask the right questions from Day 1.

## APPENDIX L: SAMPLE CHARGE FROM THE VESTRY TO THE PROFILE AND SEARCH COMMITTEE

The vestry and wardens are the formal, elected leadership of the faith community in the absence of a rector.

It is their responsibility to:

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

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

- Determine the format for and conduct a self-study of the faith community
- Write a profile of the faith community, including web update and the necessary paperwork for the Office of Transition Ministry

The vestry requests that the Search and Profile Committee assume the following responsibilities on behalf of the vestry:

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

## APPENDIX M: SAMPLE LITURGY FOR THE COMMISSIONING OF THE PROFILE AND SEARCH COMMITTEES

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

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

*The Celebrant says the following:*

Siblings 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 faith community to a special ministry to which they are called.

*The Celebrant asks the warden:*

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

**Warden:** I believe they are.

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

**Candidates:** I will.

**Celebrant:** Let us pray.

Eternal God, the foundation of all wisdom and the source of all courage: enlighten with your grace the Profile and Search Committees of this faith community, 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 faith community I commission you [names] as members of the Profile Committee of \_\_\_\_\_ Church.

In the Name of God and of this faith community I commission you [names] as members of the Search Committee of \_\_\_\_\_ Church.

## APPENDIX N: SUGGESTED FAITH COMMUNITY'S PROFILE OUTLINE

Every faith community'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.

The faith community's profile will be posted on the its website providing easy access for prospective candidates. Whatever format you choose, the essential part of any faith community's profile should include:

- **Introduction:** Who we are, including a brief history of the faith community
- **Where we are located:** A brief geographical and demographic overview of the community in which the church is located.
- **Our Mission and Ministry:** An overview of the church's mission goals, visions and dreams. More detailed information about the buildings and property, including photographs, can be put on the website.
- **Financial Information:** A statement of current financial and budget information about the faith community; compensation; housing information.
- **Gifts and Ministry of the Faith community:** as a partner in ministry with the clergy, the faith community 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 faith community 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 faith community 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 faith community, and other expectations and challenges for the new rector.

## APPENDIX O: COMMUNITY OTM PORTFOLIO

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

**Church Name:** \_\_\_\_\_  
**City:** \_\_\_\_\_  
**Address:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

### CONTACT INFORMATION:

**Name:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**City/State:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_  
**Average Sunday Attendance:** \_\_\_\_\_  
**Worship Service Numbers:** Weekend \_\_\_\_\_ Weekday \_\_\_\_\_ Others \_\_\_\_\_

### CURRENT ANNUAL COMPENSATION (INCLUDES ALL THE FOLLOWING):

**Cash Stipend:** \$ \_\_\_\_\_ **Housing Allowance:** \$ \_\_\_\_\_  
**Utilities included:** \$ \_\_\_\_\_ **Utilities NOT included:** \_\_\_\_\_  
**SECA Reimbursement:** \$ \_\_\_\_\_  
**This is:** Full \_\_\_\_\_ Half \_\_\_\_\_ time  
**Additional Compensation Note:** (20 words)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Compensation available for NEW Position:** \$ \_\_\_\_\_  
(Includes Stipend, Housing, SECA); Negotiable: Yes \_\_\_\_\_ No \_\_\_\_\_  
**Housing available for** \_\_\_\_\_ persons (if Rectory provided or offered)  
**Pension Plan:** Church Pension Fund \_\_\_\_\_ Other? \_\_\_\_\_  
**Healthcare Options:** Full family \_\_\_\_\_ Clergy +1 \_\_\_\_\_ Clergy Only \_\_\_\_\_ Other \_\_\_\_\_  
Negotiable \_\_\_\_\_  
Dental (yes/no) \_\_\_\_\_

**Budgeted Housing Equity Allowance:** \_\_\_ Yes \_\_\_ No If yes, amount: \$ \_\_\_\_\_  
**Vacation Weeks** (check one): \_\_\_ 4 weeks \_\_\_ One Month (including 5 Sundays)  
\_\_\_ Other (Please indicate # of weeks and days): \_\_\_\_\_

**Continuing Education:** # Weeks \_\_\_\_\_ Funding \_\_\_\_\_  
**Details:** \_\_\_\_\_

**Sabbatical Provision** (check one): \_\_\_ Yes \_\_\_ No \_\_\_ Negotiable  
*Link to Diocesan Sabbatical (Renewal Leave) Policy in Policies and Procedures Manual: [ecwo.org/policy-procedure](http://ecwo.org/policy-procedure)*

**Travel amount:** \$ \_\_\_\_\_

**Professional/Business Account** (check one): \_\_\_ Yes **Amount:** \$ \_\_\_\_\_  
\_\_\_ No **Comments** (20 words): \_\_\_\_\_  
\_\_\_\_\_

**PREVIOUS INCUMBENTS IN THIS POSITION:**

**Name:** \_\_\_\_\_ **Date Began:** \_\_\_\_\_ **Date Ended:** \_\_\_\_\_  
**Name:** \_\_\_\_\_ **Date Began:** \_\_\_\_\_ **Date Ended:** \_\_\_\_\_  
**Name:** \_\_\_\_\_ **Date Began:** \_\_\_\_\_ **Date Ended:** \_\_\_\_\_

**NOTES (100 WORDS):**

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**SCHOOLS:**

**Children:** Students \_\_\_\_\_ Leaders \_\_\_\_\_  
**Teens/Young Adults:** Students \_\_\_\_\_ Leaders \_\_\_\_\_  
**Adults:** Students \_\_\_\_\_ Leaders \_\_\_\_\_  
**Day School** (*Check those that apply*): \_\_\_ PreK \_\_\_ K \_\_\_ K-6 \_\_\_ K-12 \_\_\_ Other  
# Students: \_\_\_\_\_ # Teachers: \_\_\_\_\_ Total Staff: \_\_\_\_\_

**NARRATIVE:**

In our baptism we promise to proclaim by word and example the Good News of God in Christ, seeking and serving Christ in all persons. You are invited here to reflect on your ministry by responding to the following questions. Each answer has a 1200 character limit. Attach a sheet with the answers to these questions:

- Describe a moment in your worshipping community's recent ministry that you recognize as one of success and fulfillment.
- How are you preparing yourself for the Church of the future?
- Describe your liturgical style and practice for all types of worship in your community.
- How do you practice incorporating others in ministry?
- As a worshipping community, how do you care for your spiritual, emotional and physical well-being?
- 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 community.
- Tell about a ministry that your worshipping community has initiated in the past 5 years. Who can be contacted about this project?
- 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?

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

**CONNECTIONS:**

**Your worshipping community's website:** \_\_\_\_\_

—

## REFERENCES

Please provide contact information for the following references:

**Bishop Name:** \_\_\_\_\_

**Contact information:** \_\_\_\_\_

\_\_\_\_\_

**Diocesan Transition Minister Name:** \_\_\_\_\_

**Contact information:** \_\_\_\_\_

\_\_\_\_\_

**Current Warden/Board Chair Name:** \_\_\_\_\_

**Contact information:** \_\_\_\_\_

\_\_\_\_\_

**Previous Warden/Board Chair Name:** \_\_\_\_\_

**Contact information:** \_\_\_\_\_

\_\_\_\_\_

**Search Chair Name:** \_\_\_\_\_

**Contact information:** \_\_\_\_\_

\_\_\_\_\_

**Faith Communities/Institution Leader Name:** \_\_\_\_\_

**Faith Communities/Institution Leader Ministry:** \_\_\_\_\_

**Contact information:** \_\_\_\_\_

\_\_\_\_\_

**Local Community Leader Name:** \_\_\_\_\_

**Local Community Leader Relationship to Faith Community/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 Zoom interview, the aim is greater depth into who the person is and the suitability of that person as a match for the faith community.

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 faith community? 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 faith community with a strong youth component, don’t say “We have a lot of young people in our faith community and are seeking someone to build our youth programs. Tell us, how do you feel about young people?” Rather, ask the priest what experience they have working with 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 faith community comes only after the candidate has had their opportunity to talk about themselves, and their own ministry, hopes and dreams.

These questions are all just sample ideas. The search committee will no doubt come up with the questions they feel are appropriate to the particular faith community, but these are offered to provide a place to start in the thinking process. Less is more, however. Asking a lot of questions leads to shorter answers or not getting all the way through the interview.

### **Sample Questions for Zoom and Face-to-Face Interviews by Search Committee - Rector Search:**

#### **Screening Criteria:**

##### **General opening type question**

- Why do you want to be the next Rector for xxx and what unique gifts and talents would you bring to this calling?

**Communication:** (open communication about the faith community’s health, open to hearing others ideas, engages in 2 way dialogue to listen as well as speak)

- Tell us about your idea relationship with each of the following groups: vestry, staff, lay leaders, the faith community in general and how you develop and maintain those relationships.
- As the priest there will be times when you have to make the final decision and you know it is not going to be popular with all vestry or all members. Tell us about a time when you had to make such a decision and what your role was and how you worked with those that dissented in that situation. What did you learn from it?
- Sometimes we make a mistake. When you are the Priest, those mistakes can become visible quickly. Tell us about a judgement call you made that upon later reflection you thought was not the best decision. What did you do when you realized there were other better options and what if anything did you learn from the situation?

**Pastoral Care/counseling:** (Want someone who is actively involved and see’s value in connecting with faith community members who are unable to attend in person.)



- xx has an aging population and as such the pastoral care needs are high, what is your ideal model for serving members that are not able to attend church once it is open again? (Leave it open at first and if they do not mention use of Deacon or laity, ask What do you see as the role of a Deacon or laity in pastoral care?)

**Community Outreach:** (Sees value in outreach to marginalized communities that xxx currently serves and/or other service possibilities. Also, able to outreach to business and local leaders (rotary, Kiwanis, city neighborhood associations etc.) to build awareness of xxx presence in community, grow # of worshipers, and potential funding opportunities for St. Johns.)

- Tell us about a ministry project that exists because of your leadership. What was your role in its creation and what did you learn from that process?

**Business/Financial:** (Experience with Finances and business aspect of operating a faith community. Able to guide vestry and faith community leaders in decisions about positive allocation of resources. Able to effectively supervise and delegate to staff.)

- What is your personal approach to stewardship? How if at all does this influence your ministry?
- Tell us about successes you have had in growing the financial resources for a faith community?
- One person cannot be expected to know everything – who do you turn to for guidance, i.e. who is your support network?

**Faith community Involvement:** (Able to work with lay leaders of various committees – inspires and encourages lay involvement)

- There are many and varied aspects to running a faith community. In your ideal scenario what do you like to do yourself and when and how do you engage faith community members? Tell us about a time when you achieved this model. Include what you did to engage others and what you learned in the process.

**Leadership:** (Exemplifies the teachings of Jesus in thought, word and action. Serves as role model to members of the faith community and staff. i.e. walks on water category. Has ability for self – examination and inward reflection and own rich spiritual path to lead from this place. Has well developed spiritual community to reach to for support when needed.)

- There is a high rate of “burn out” amongst priests, tell us about yourself and how you care for your own spiritual, emotional and physical well-being and what you do when you are feeling depleted?
- Tell us about a time in your recent ministry that you recognize as one of success and fulfillment. What is it in particular about this situation that brought you joy?
- Have you defined a personal mission statement and values for yourself and if so what are they and more importantly how do you use them in your daily life?
- What type of decisions do you see as the priests to make and what type of decisions do you make with the following groups and when if ever do you let them have the final decision: vestry, staff, lay leaders, and members?
- What do you see as the role of the vestry and how do you mentor and support them to operate in that manner?

**Preaching and Teaching:** (Able to preach a sermon based on Christian principles that engages audience and provides take aways, encourages faith formation through preaching and other teaching opportunities such as adult education and Sunday School. Open to new ideas for worship that may broaden appeal to new members. Open to our unique music preferences and will work in cooperative manner with music director.)

- Describe your liturgical style and preferences and how do you engage others in planning for services both Sunday and special services such as weddings, funerals and holy days.

- Where do you see the Episcopal church in 5 – 10 years? What is your vision for ministry in the Church of the future?

### **General Closing questions:**

- Is there anything that you think it is important that we know about you in relation to this position that we have not asked you?
- Do you have any questions of us.
- 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?
- 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 faith community. What did you do to handle the situation?
- When you first came to your present faith community, if you knew then what you know now, what would you have done differently?
- How do you handle the balance between vocation and home life?
- Describe your prayer life/spiritual discipline.
- Describe your sermons. How do you prepare them; what kinds of topics do you address; what is the place of the Bible, current events, or your own experiences?
- How would you describe your leadership style, with staff, vestry, church members and the community?
- Tell us about your involvement in community and diocesan activities.

### **Sample Questions for Finalists**

- Tell me about a time in your ministry when you felt most alive, most energized, most excited. What was this time, who was involved, and why does this particular incident stand out? (This is the most important question of all and should be asked of all final candidates!)
- Tell us about a time when things weren't going well
- In the past 3 years has your faith community reached its stewardship goals, and, if not, why not?
- What is your theology of stewardship and how do you see your role?
- What would you like to tell us about yourself that will help us to know you better?
- What can we tell you about us?
- One of the particular areas for growth at \_\_\_\_\_ is \_\_\_\_\_.
- Tell us how you have addressed this in other faith communities 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 faith communities (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 faith community, Search and Profile Committee, and vestry.

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

**Communication with the Faith Community:** Redundancy is the key—special mailings to the faith community; weekly announcements at worship by the search chair or warden; regular articles in worship leaflets; information on your website; and the faith community’s newsletter are all critical to a faithful and successful process.

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

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

It is impossible on paper to overstate 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:

- **Initial email stating that OTM and letter of interest have been received.** “We wanted to take a moment to let you know that we have received your OTM materials. We are still in the process of receiving names. However, you should expect to hear from us with more information within a month’s time. In the meantime, please pray for us as we enter into a process that will result in the call of a new rector for St. xxx. You can be assured of our prayers for you as you discern your next steps in ministry.”
- **Letter stating that you would like to get to know them better.** “We have enjoyed reading your OTM Portfolio and believe you might have the gifts and skills for ministry needed for the life and ministry of St. xxxx at this time. We would like to get to know you better and would like you to get to know us better.
- **Letter stating that you no longer wish to continue on with them.** “...Thank you for taking the time to enter into the search process here at St. xxx. After thoughtful review of your materials in relationship to our faith community’s profile and faith community’s OTM portfolio we have decided not to have you continue on with us further. We wish you every blessing and pray God’s strength and encouragement be with you as you discern your next steps in ministry.
- **Contact a semi-finalist to set up a phone interview.**
- **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.**
- **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.
- **Vestry Contact with FINALISTS to set up meetings with vestry and Bishop.** These are handled by phone.
- **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 (faith community name). We are pleased to present the names of these (number) priests that we believe are the best match for our faith community.

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 (faith community name). Each of us could comfortably imagine any of these persons as our next rector and we will enthusiastically support them.

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 faith community 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, and God in this way. We have all grown from this experience.

1. Some operating principles that worked for us and we strongly recommend to you:
  - a. Context is everything; look for the priest who will be the best match for your current challenges and opportunities, not some idealized “best priest.” What is the work that lies ahead?
  - b. Emphasize that you are seeking God’s will
  - c. Treat each other with mutual respect and trust and fellow discerners
  - d. Share responsibility for prayer and scripture
  - e. Be open and honest with each other and with the candidates
  - f. Be sensitive to the candidates and to each other
  - g. Ask for prayers (and remember you have ours)
  - h. Be careful about communications with candidates
  - i. Maintain confidentiality
2. Summary Information on Candidates (Attached):
  - a. What drew us to the candidate
  - b. What we believe we know about: match issues, personal life, personality/style, extra-parochial ministry, how the candidate sees our gifts and challenges, why a move makes sense for this priest now and why to us
  - c. Our thoughts about implications for the faith community if this person is called
3. You might want to use the onsite visits to let them know more about:
  - a. Specifics regarding our building
  - b. Specifics regarding our finances
  - c. Our outreach
  - d. The Episcopal Church in Western Oregon
  - e. Yourselves
4. Among other things we think you will want to further discuss:
  - a. Their relationship with their vestry
  - b. Their management style and experience
  - c. Their experience with mutual ministry review/evaluation
  - d. Housing and salary
  - e. Other issues that have arisen along the way unique to this call. Don’t assume it will all work out through avoidance; have the hard conversations before extending a call, not after

PRAYER FOR THE CALLING OF A NEW RECTOR:

*Almighty God, Giver of every good gift: look graciously on your Church, and guide the hearts and minds of those who shall choose a rector for this faith communit, 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 FAITH COMMUNITIES

- Remember that this time is a two-way interview. The candidate (and their family) is as interested in finding out about you as you are them.
- 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.
- Plan to show the candidate the surrounding area and some of the local high spots
- Allow for some "down time" for the candidate to reflect on their experience in your faith community
- Decide in advance with whom the candidate should meet and be consistent among the candidates. Keep in mind that the Search Committee's work has to date, all been virtual. They will be eager to welcome candidates and may be included in worship or social gatherings. The vestry, however, needs time alone with candidates since they will be making the final decision. Candidates and church staff, including the Interim, may be invited to meet each other as well, but are not involved with the interviews.
- Do take care of all logistics prior to the candidate's arrival. Arrange for their transportation, including flights, if necessary, pick-up at the airport, etc. Book (and pre pay) a hotel room, make arrangements for the family to visit the local school (if appropriate), etc.

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

## APPENDIX U: CANONICAL PROCESS FOR CALLING A RECTOR

The calling 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 Office of the Bishop.

Constitution and Canons of The Episcopal Church

### **Canon III.9 *The Appointment of Priests***

*(2) No faith communities 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 Faith community.*

### **Procedural Checklist for Faith Communities calling Rector having been through the Search process:**

- The warden forwards (in writing) the lists of nominees to the Bishop. (Generally, these are the names presented by the search committee to the vestry.)
- 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.)
- Having received the counsel of the Bishop, the vestry is permitted to convene for the purpose of electing their rector.
- 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 Church in Western Oregon.

### **Procedural Checklist for Faith Communities going from Priest-in-Charge to Rector**

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

### **Important Note:**

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



## APPENDIX V – LETTER OF AGREEMENT WORKSHEET

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

Name of faith community: \_\_\_\_\_ City: \_\_\_\_\_

Name of clergy candidate: \_\_\_\_\_ Position: \_\_\_\_\_

Hours of work per week (if part time) \_\_\_\_\_  
If part time, how many Sundays per month? \_\_\_\_\_

Vacation \_\_\_\_\_

(Commensurate with hours of work, i.e. full-time rector receives minimum 30 calendar days; half time receives minimum of 15 days)

Continuing education time (Up to two weeks/year for full-time) \_\_\_\_\_

*\*Attendance at Clergy Conference or the Annual Meeting of Convention is not considered Continuing Education nor Vacation*

### Compensation:

See diocesan website for

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

### Health and pension:

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

- Pension fund contribution (18% of cash and housing value) \$ \_\_\_\_\_

### Health Insurance:

- \_\_\_\_ For clergy person only
- \_\_\_\_ For clergy and spouse
- \_\_\_\_ For clergy and family

Health Insurance Total: \$ \_\_\_\_\_

Moving Expenses: \$ \_\_\_\_\_

Yearly budget set aside for sabbatical funds: \$ \_\_\_\_\_

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

## APPENDIX W: SOME THOUGHTS AS THE SEARCH COMMITTEE WINDS DOWN

- You have done an incredible job in your discernment of the next clergy partner for your faith community, 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 faith community, a member(s) of the Search Committee may wish to write an evaluation of its work, noting the surprises and challenges throughout the process. The evaluation/summary should be made a part of your faith community's archives and a courtesy copy sent to the Office of the Bishop. If you made use of a transition 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 faith community's 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 Faith Community's Profile, including the results of faith community's surveys (unless confidential), faith community-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/profile, 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-takin service (rector and interim), installation of search committee, discernment retreats, and welcoming/installation of rector) should be forwarded to the faith community's archives.

## APPENDIX X: SAMPLE 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 them, or on the shoulder of the person in front of you. When all are in place,

**The Senior Warden says:**

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

**The Junior Warden continues:**

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

**The Senior Warden asks the faith community:**

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

**People:**

We do.

**Priest:**

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

**People:**

Gracious God, be with N. as he/she/they 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 Y: WELCOMING THE NEW RECTOR

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

### Collecting

- Have a set of keys ready that will include a master key, keys to the main office, staff offices, and the sacristy
- Prepare and present a folder that includes the following information:
  - Current membership list and the most recent pictorial directory if there is one
  - A roster of vestry members
  - A copy of the budget and minutes of the last three vestry meetings
  - A directory of ministries, if there is one
  - Letters of agreement for current staff members
  - A schedule and list of the duties of office volunteers
  - A copy of any policies, procedures, or personnel guidelines
  - A copy of the diocesan canons

- The last two or three issues of the parish newsletter, diocesan news, weekly news bulletin, and Sunday service leaflet
- A roster of active committees
- A map of the area
- If there are guilds for men or women or other groups that meet regularly, provide a description of their activities and meeting schedule and their expectations of the rector
- A calendar with key dates marked of upcoming parish events and what is expected of the rector
- 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, intercessors, and other committees, along with current Sunday schedules

### **Coordinating**

- 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 Convocation, clergy meetings, Diocesan Convention dates, clergy dates and other ecclesiastical matters.

See also: <https://www.ecfvp.org/blogs/2679/welcoming-a-new-rector>

## APPENDIX Z: SOCIAL MEDIA

All interactions with parishioners/members of your community that occur online using social media platforms ARE interactions with parishioners/members of your community.

Because social media is so integrated into our daily life and routine, there is no distinction between the “virtual” and the “real” world. Online interactions are interactions. Who you are online is who you are. This is incredibly important with regards to individuals who become ordained and therefore become public figures. It also matters for the institution; saying something on social media is like shouting it into a crowded room.

This is important because power dynamics are important with regards to the church and creating safe boundaries.

### BASIC GUIDELINES

- A social media presence is NOT optional. The church’s presence on social media is essential because it allows for the church to be integrated into the everyday lives of the congregants, neighbors, and those interested. It draws the church out from “Sunday Morning” to being a source of spiritual growth and grounding throughout the week.
- Social media is not confidential. Any post, message, tweet, image, can be screenshotted, shared, forwarded, reported, or passed along.
- Safe church applies to social media platforms - particularly within group settings like Facebook Groups or 1-1 chatting, especially with children, youth, or vulnerable adults.
- For clergy: policies around ‘friending people’.
  - Make a choice and stick to it regarding who you will “friend” or “follow” in your congregation/ context.
  - If you friend, your personal page is no longer personal, it is professional - and you need to make edits.
  - If you do not friend, make it known ASAP in the beginning of your tenure so as to avoid hurt feelings.
- You don’t have to respond to everything immediately. Have scheduled “off” days from social media, but let another administrator know, so they can be on the lookout.
- You do not need to be on every platform



*the*  
**EPISCOPAL**  
**CHURCH** *in*  
WESTERN OREGON