

Diocese of East Carolina



Transition Handbook

A Guide for Vestries and Search Committees

2021

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INTRODUCTION

The time between the departure of a priest and the arrival of his or her successor is a rich and complicated time in the life of most congregations. Many things seem to happen all at once. But it is often also a time where the Holy Spirit's presence is felt more acutely. Vestry members, especially the Wardens, should lead by example. Be calm, be prayerful, be deliberate, and remember that you are not alone. All will be well.

The process for searching for and finding a new priest will take a great deal of energy from a small number of people, especially the Search/Discernment Committee, while everyone else will be occupied with the ongoing life of the congregation. And the process of searching will have changed from those in the past. Generally, there are fewer candidates. Some of the strongest candidates will be people who may have been marginalized in the past and feel themselves newly enabled to seek good calls. The process is more streamlined. While self-study is still worthwhile, often it is less elaborate than in the past and glossy profiles are rarely printed today. It is more important to use the resources to ensure that the parish website is up to date and best represents the personality and story of the parish.

Transition does not last forever, though it can feel that way. How long it takes depends on the congregation, and the movement of the Holy Spirit. It does not end until the right person is identified, called, and accepts the call. The theoretical minimum is probably about six months, but the norm is longer. There is no doubt that taking the time to find the right person is worth it in the long run.

All along the way, the Wardens and the Search Committee will have the companionship of the Bishop and the Canon for Diocesan Life and Leadership, who serves as the diocesan transition minister. We may also suggest a "Search Coach" who can work more closely with the Search Committee than the Canon's schedule permits. Remember, no congregation makes this journey alone: God is with you, and so is the Diocese.

PHASE ONE – SEPARATION AND PLANNING

Notice of Transition

The transition process begins when the rector informs the vestry of their intention to leave. Two things should happen at this point. First, the priest and Senior Warden should select a leaving date together. Experience tells us that four to five weeks is the best length of time to say goodbye. Less time adds to the general anxiety of the parish and more can cause restlessness and/or uncomfortableness. The Senior Warden should contact the Bishop's office to let us know of the Priest's plan to leave. The Bishop or his designee will come to be with you at the first available opportunity. The work of finding a new rector can wait until you have bid farewell to the current priest.

Saying Goodbye

No matter the reasons or circumstances for the rector's departure the elements in saying goodbye are the same. It is always possible to find things that have been good, things for which to feel grateful, and things to celebrate even while acknowledging any conflicts or challenges. The congregation must deal with the emotional subtlety of missing a priest they knew and loved, while also recognizing that any priest's limitations become more obvious after they are gone. Therefore, it is important that the separation be graceful because a parish that does not feel good about the departure of its former rector is handicapped in establishing a relationship with the new priest taking on that call. An exit interview can be very helpful in the stages that are to come. See page 22 of the Appendix for sample questions.

The leaving clergy person should provide instructions and passwords, locations of documents, rationale for procedures, ongoing pastoral work, and information on any other matters that will smooth the transition for the successful arrival of the new rector. Parish e-mail accounts must be closed, and proper forwarding information displayed. For a short time, some e-mails may be forwarded. The website should be updated with the new information as soon as possible. There is no need to end friendships, but continuing inclusion may be cause for pain rather than encouragement toward the new reality and development of new boundaries.

Often there is a party and a chance to celebrate and wish each other Godspeed. Make the goodbye, however it is arranged, to be in keeping with the personality of the parish. It is the opportunity for members of the congregation and the priest to offer thanks, to address each other in love, and to bring their relationship to a close.

Changing Roles and Boundaries

Because clergy have such a strong influence on every facet of parish life, clergy who leave or retire should be careful, and intentional, to avoid any participation in the decision-making process in the parish going forward. Therefore, boundary guidelines for the leaving priest should be established for everyone's understanding. At the very least, the leaving priest should not return to the parish for any reason until the successor has been in place for at least a year – and then only at the invitation of the new Rector.

Further, the departing clergy person should avoid any discussions or questions about the parish, and even social functions that are attended mostly by parishioners. Instead, refer all questions back to the vestry and new priest. And, as hard as it may be, the departing clergy's family members should also withdraw from parish activities.

Clarifying Roles in the Time of Transition

The Vestry

The Vestry is elected by the parish and has responsibility for the call of the new Rector. The Vestry, canonically charged with the day-to-day administrative operations of the parish, will need to make some choices about the approach to clergy transition. The Vestry should model a calm and careful attention to leadership in transition.

Depending upon the circumstances, the Vestry may call a Search or Discernment Committee and delegate portions of its responsibility to that committee. The Vestry should meet with the Canon for Diocesan Life and Leadership **BEFORE** forming a Search Committee. We suggest that, if a search committee is used, one to three members of the members of the Search Committee are also Vestry members (how many depends on size of the Search Committee). The Vestry leads this process with transparency for the whole congregation.

The Interim Rector or Supply Clergy

If used, an Interim Rector's primary task is to care for and lead the congregation during the transition. In the absence of an Interim Rector, Supply Clergy are invited by the Wardens to lead Sunday liturgy, and on occasion other weekday liturgies. The recommended minimum supply clergy remuneration schedule for supply clergy is in the Clergy Compensation Handbook on the diocesan website.

Factors to consider in making the decision of which type of clergy to choose are: availability, cost, stability, congregational healing (if needed), length of tenure of departing rector, and breaking bad habits. Interim rectors can help a congregation maintain a sense of normalcy, and keep projects and administration going, but they are more costly because they must spend more time, and it is often expensive for them to move and take on short-term work.

In any case, the Interim Rector does not guide the search or write the portfolio answers. Interim and supply clergy do not engage the Search Committee. An Interim Rector is not to be involved in work with the Search Committee or other aspects of the transition. The Interim Rector will not normally be eligible to be a candidate for the permanent Rector position.

Priest-in-Charge

In some circumstances, and always in consultation with the parish, the Bishop may appoint a Priest-in-Charge for a pre-determined period. A Priest-in-Charge usually has the same responsibilities as a rector but may also be in place to give the congregation a rest from a time of turmoil. Another difference is that typically, the Priest-in-Charge is eligible to be a candidate for the permanent Rector position.

Assisting Clergy

The canonical relationship between assisting clergy and the parish is established through the Rector. Pending the call of a Rector, Priest-in-Charge, or Interim Priest, the assistant(s) may continue in the service of the parish if requested to do so by the Vestry, under such terms and

conditions as the Bishop shall determine in consultation with the Vestry. In typical circumstances, assisting clergy stay with the parish, often even after a new Rector is installed.

The Bishop of East Carolina

The Bishop is the chief pastor of all congregations in the Diocese. The Bishop wants you to call the priest who is the best possible partner with you in ministry at this time. The Bishop wants your involvement in this call and will not simply “send you someone he likes.” The Bishop is building a team of skilled clergy and seeks your success. The Bishop seeks your active engagement and conversation in this work.

Sometimes people are concerned that the Bishop can ‘veto’ a potential rector. This is not a casual decision; however, the Bishop will not allow a parish to call someone he believes would damage the parish. Such an action is undertaken under canonical guidelines with the deepest care and conversation.

The Canon for Diocesan Life and Leadership

The Canon is your Transition Consultant on behalf of the Bishop. As such, she will coach you in the process, provide information about the “clergy market,” and advise on best practices, engaging the parish, communication, and canonical requirements along the way. The Canon knows many pitfalls and best practices for the contemporary work of an effective search and transition and serves as a resource to the Senior Warden and Search Chair. She is not a secret agent, an enforcer, or a psychic.

Preparing for the Search

Sometimes, especially in smaller parishes, the Vestry also serves as the Search Committee. In either case, you should arrange to meet with the Canon before getting started in the actual search.

Prepare the Search Committee’s Charge

A charge is a formal document that spells out the mission and duties of the Committee. The Vestry should specify (1) the details of the office the Committee is assigned to fill, e.g., part time or full time; (2) what the budget for the Committee is; (3) how many final candidates – generally one- the Committee should present to the Vestry; and (4) anything else the Vestry wants the Committee to include in the process. (see Appendix page 22 for two samples) The Charge will also call on the Committee and its members to maintain confidentiality about candidates, while communicating regularly about the progress of the search process, and most

importantly, will remind the Committee to pray regularly about the search and to share its prayer with the Congregation.

Develop a Parish Search Collect

Just as the Vestry will pray about the search process and for the next rector, whomever that may be, so should the parish. Praying together is helpful for everyone. To that end, the charge should include the development of a Collect to be prayed together for the length of the process. A Collect is a prayer in which the phrases are arranged in a specific pattern (see Appendix page 25). Once developed, the Collect for the Search should be readily available and prayed at all regular worship gatherings.

Establish a Budget and Compensation Package

The vestry lays the groundwork for the search and establishes a search budget. There are many, sometimes costly, components to a search including updating and enhancing the website, the self-study, cost of the search committee consultant if one is engaged, cost of visiting candidates, and of visits to the parish by the candidates, background checks of the finalists, relocation expense for the new rector and incidentals that might include postage, meals and the like.

Further, the Vestry must decide on a range of compensation and the benefit package it will offer the new rector. Reviewing the Compensation and Benefit Guidelines found on the Diocesan website is helpful. Appendix page 26 gives an overview of Diocesan standards for benefits. When a call has been issued and accepted and all negotiations are completed, the Bishop gives final approval to the compensation package by his signature on the Letter of Agreement.

Communication

Communication with the parish is essential. Short announcements should be made at services with some regularity, so that any information that can be shared with the congregation is done so. In written communication, like weekly emails or monthly newsletters, let the congregation know where the search is in general. While the content of deliberations and the names of applicants are confidential, it is important to communicate, on a steady basis, the progress of the process. Parishioners must be assured that the interim period is being well managed and that advancement, however seemingly invisible, is being made.

Select the Search Committee Chair and Committee

The committee is appointed by the Vestry and is responsible for the process of discerning the priest who will bring the gifts and skills best suited to serve the Congregation's needs. This process will include prayer, the parish's self-study, the preparation of the congregation's invitation materials, the review of written applications, participation in interviews, travel to visit candidates' home parishes, and lots of meeting time to discuss, evaluate, and make decisions. Therefore, the choices are critical. First select the chairperson. This should not be a vestry member but should be someone with excellent communication and organizational skills, as well as someone who is willing to give the time the position will require.

How you go about making the selection of the chair and the rest of the committee is up to you, and there are a variety of ways. You could invite nominations from the parish as a whole or from the vestry. The nomination process can be a written form or more informal and self-nomination is certainly permissible.

You should not consider anyone who is ordained (Episcopal or otherwise) – they tend to have undue influence on the committee. No one from the parish staff or a one of their close family members should be considered and no two people from the same family should be considered.

It is suggested that the committee be an odd number of people (5,7,9), of manageable size (no more than 12). Vestry members, but not necessarily wardens should be considered. It is strongly encouraged that depending on the size of the search committee, one to three members also be members of the vestry.

In making the choices, remember that having served on a previous search committee can be, but is not always a plus. After all the search process has changed. The committee members should represent the broad scope of the parish. They should be positive minded, and supportive of the parish. They will need to be available to attend many meetings over several months. The Committee will be making delicate and subjective decisions affecting both the future of the congregation and the careers of the candidates. They must be able to organize and keep track of large amounts of information, they must be able to express, listen to, and evaluate divergent viewpoints. People who do not work well with others will at best make the Committee's work harder than it needs to be.

Further, the Committee will learn information about candidates that is strictly and absolutely confidential. They may be put under pressure to share information that cannot be shared, (even within their own families) doing so violates both the trust of the candidates, and the integrity of the process. Anyone who is not able to maintain confidentiality should not serve in this capacity.

When the Committee has been formed and the Charge for them has been prepared please forward the name and contact information of the Chair and the Charge to the Canon. The Senior Warden, in the name of the Vestry, should commission the Committee (Sample Commissioned Liturgy Appendix page 27) for its ministry at a Sunday Service. The Canon or Search Coach will meet with the Committee as soon after they are formed as possible.

PHASE TWO – INTERNAL PREPARATION

Bonding Exercise

This Committee will spend a great deal of time together and they will do critical work in the life of the parish. Therefore, it is especially important that they know each other well enough to work well together. There are many “bonding exercises” that might be used to facilitate this coming together and space will not be spent here to suggest any particular one. However, at the very least, the committee should come together for a meal. When a group “breaks bread” together the usual social barriers seem to be lowered. Similarly, a retreat of some sort is usually effective. The Search Chair should set the process in motion.

Deciding How to Make Decisions

Whether the Vestry appoints a Search Committee or serves as the committee themselves, it is important to reflect on how this work is different from ordinary church business. Often, perhaps even normally, we work by majority rule. But searching for a new priest invites a different spirit, and it is important to recognize from the outset that a divided call is rarely a good call. That means figuring out how to work together in a way that allows the sense of the group, rather than a bare majority, to prevail, and brings along those with divergent viewpoints.

As one of its first acts, the Committee (or vestry acting as the Committee) should discuss and decide how it will make its decisions. The key options include:

1. *Majority Rule*: Take a vote; whichever side has more votes, wins. The advantage of this approach is that it is efficient. The disadvantage is that up to half the group can feel left out of and angry at every decision, which is a lot of opportunity for bad feelings. For that reason, it is not the recommended way.
2. *Unanimity*: No decision is made until everyone agrees. The advantage to this is that everyone stays happy (or pretends to). The disadvantage is that everyone has veto power, and there is risk of infinite and unbreakable gridlock on every decision. Also not recommended.

3. *Consensus*: A decision represents the weight of opinion in the group but is not finalized until everyone in the group can support it (even those who would have preferred a different outcome). The advantage is that it keeps the group operating together and fosters trust. The disadvantage is that it can require some painstaking negotiations to reach an outcome acceptable to all. Still the advantages are greater than the disadvantages, and this is the way most of the successful transition processes are done.

Self-Study

No matter how long the last rector was with the parish, the parish has changed in that time. If a detailed self-study has been done in the last few years, it may be that it only needs to be updated, but if it has been more than five years, or if the parish has been through a difficult period, then consider starting from scratch.

One good place to begin is an “all parish” meeting in which members of the congregation are invited to express views, wishes, and hopes. This meeting is especially helpful because members get to hear from one another before any further work is done. It is also an ideal time to share with the parish an overview of the search process.

To go deeper, the Search Committee in consultation with the Vestry, may decide to survey the parish. There are companies that offer consulting service of this type at surprisingly reasonable costs, based on congregation size. The Canon can make some recommendations if this approach is appealing. If not, the Search Committee might develop its own survey (there are online resources that might help) and/or hold a series of focus group discussions. Doing a survey will also help the whole congregation know that the Search Committee is working in everyone’s best interest. A sample survey cover letter is in Appendix page 28. In all cases, there should be a means to hear from every member of the church at this time of transition. When all data has been collected, it is worthwhile to hold a second parish-wide meeting so that everyone can hear back what has been said and are given the space to comment and ask questions. This meeting is an additional opportunity to hear feedback. It is also important because the church members will witness that they have been listened to by their Search Committee.

Congregation’s Website

As the self-study is being done, the Search Committee should take a careful look at the congregation’s website. This is usually the first way a potential candidate will learn more about your church. They will pay close attention to what the website says, and how it is said. There are a couple of headline things to which you should pay particular attention.

First, the site needs to be a good reflection of the congregation itself. It should be clean, accurate, user-friendly, and up to date. It should list service times and the church location

clearly and should be regularly “swept out” so that outdated information is deleted. It is a website, not an archive! A simple site is fine, particularly if the congregation structure is also simple, but it should be clear, inviting, and lively. There should be pictures and the pictures should include the people of the parish, but pictures need to be timely.

Second, the Committee should create a section of the site, easily found by visitors, dedicated to the transition. This site might be called “Transition” or “Search”. It should contain at least these three items: (1) An open letter or “Profile” narrative directed to potential candidates that tells your story. What about your parish is special, what do you love, what do you worry about or struggle with? Most importantly, what are you hoping your next priest will help you do? The letter should be warm, inviting, and urge readers to discern whether they are called to have a conversation about the possibilities of ministry with the congregation – and if so, to apply. Some congregations put this in the form of a short video. It is this profile that takes the place of the glossy booklet form profile of old. (2) The Transition website tab should also include a regular update from the Search Committee about where the process stands. This is part of the way the committee can make sure everyone in the parish always knows (or has the chance to know) what is going on. (3) The Parish Search Collect.

Parish Profile in More Depth

Since the profile is used to introduce prospective candidates to the parish and the local community, there are a variety of topics the Search Committee may choose to include.

- ❖ Parish history
- ❖ Current parish demographics
- ❖ Pictures of the parish, people, and area
- ❖ Community demographics and information
- ❖ Description of the Diocese of East Carolina
- ❖ Details on parish life such as
 - Christian formation
 - Worship Style
 - Outreach
 - Stewardship
 - Pastoral care
 - Parish events
- ❖ Goals & Objectives the parish hopes to achieve
- ❖ Financial data and history
- ❖ Current budget – this can be a summary budget, but do not hide financial information

This profile is a unique picture of your congregation, its ministry and vision. While one naturally wants to put the best foot forward, this is the time for honesty and clarity. You are entitled to

an honest assessment from potential clergy of their strengths and weaknesses. The tone to receive that is set in the honesty found in the profile.

Think too, of the benefits the profile provides the parish. It is not just a recruitment tool to attract the right priest. Engaging parishioners in thoughtful discernment about God's will for their community of faith is much more important than just the profile. The process should result in a vision emerging as shared goals are named.

The profile must be approved by the vestry and should be reviewed by the Canon before it is posted.

PHASE THREE – THE SEARCH

The Parish Portfolio

The Office of Transition Ministry (OTM) is the office within the Episcopal Church Center responsible for maintaining and updating active “portfolios” of individuals and congregations engaged in a search. While a Parish profile is not required for all searches, the portfolio is the main tool used to announce the open position. Preparing the portfolio is the responsibility of the Search Committee, and it too must be approved by the vestry before it is published.

Eventually, you will see that the questions answered by individual priests are identical to those answered by congregations so that the work spent on creating your Portfolio will assist the Search Committee members in reading through the candidates' responses.

The Canon or her assistant, Hannah Jarman, hjarman@diocese-eastcarolina.org will provide to the Search Chair, the Portfolio list of questions to be filled in. When it is complete and has been approved by the vestry, forward an electronic version to Hannah. The position announcement will then be posted on the OTM site and two other sites that are often used by clergy considering a new call. The other two sites give considerably less information, therefore the instructions on them will direct candidates to the OTM site and ask them to respond with a cover letter and their own OTM portfolio – all of which will be given to the Search Committee at the end of the posting period.

The time between the initial posting of the position announcement and the receipt of completed applications will be six to ten weeks. The Canon will review all applications received and will speak to her counterparts in the relevant Dioceses to make sure there are no “red flags” on any of the candidates. It is unfortunately true that sometimes someone will apply for a position for which they are either not eligible or when they are under some type of cloud in their home diocese. While this “red flag check” is not the thorough vetting process that will be

done in Phase Four, it does prevent the most obvious of errors. There is no sense in wasting time on an ineligible candidate.

When the closing date of posting has passed and the Canon has performed the “red flag” check, the Search Committee will receive from the Diocesan office a list of candidates along with their OTM portfolios to be considered. If the Committee received any application material directly, it should be forwarded to the Canon right away. The Canon or Search Coach will again meet with the Committee to provide coaching on how the interview process might go.

The time of waiting is the ideal time to begin to develop interview questions and the discernment process. While doing so, verify the budget allowed by the Vestry for the remainder of the process. Again, remember to communicate frequently with the parish using various methods to do so. They will be anxious to know what is going on. Search Committee and Vestry members should remember to pray regularly for discernment. Once applications are received, Search Committee members should pray for the candidates by name. Ask God’s will for each priest, whether it is with your congregation or not. Keep prayer central to the search process.

It is also the time to start living into being the congregation your self-study has shown you dream of being. This will be the most attractive quality imaginable for candidates and it allows the lay leadership to begin setting the tone of the whole congregation and to begin the work, so that the ordained leadership comes to help reach that vision forged in dialogue.

A Word about Confidentiality

From the moment the Committee receives an application, it assumes the duty of safeguarding the applicant’s confidentiality. Committee members may not share any details at all about applicants; obviously not names, but also not details about age, gender, geographic location, make of car, whether it’s a dog or cat person, or anything else no matter how inconsequential. Not even with their spouse or partner. In a world of Google searches, it takes only one or two data points for a diligent searcher to figure out who a candidate is. Think of it this way: it is good that members of the congregation are curious, and since they are curious, it is natural that they should try to find out what they can. *It is the Committee’s job to see to it that they do not succeed, not even a tiny little bit.*

This means more than not blabbing. It also means being careful about emails – every Committee member should use a private email address that no one else shares. It means being careful about papers and where they are left; and about conversations and whether they can be overheard. The reason for all this seriousness is the harm that can come from mistakes. Breaches of confidentiality, even small and innocent ones, have derailed search processes, divided congregations, and betrayed candidates. Remember, only one of your candidates will be chosen.

PHASE FOUR – INTERVIEWS AND RECOMMENDATION

Once the applications are received, the Committee's role changes radically. Formerly it was in the business of inviting as broadly and effectively as possible, and nothing it was doing was confidential. Now it must scrutinize actual applications from actual priests, to carefully and prayerfully discern whether one of the priests is called by God to serve in this particular congregation, while letting everyone in the congregation know where the process stands and simultaneously guarding the identity of each applicant. It is all do-able, but it takes care.

Review the Applications

Committee members review the application materials, and the Committee decides who it wants to move forward to an interview. This should (if possible) involve an in-person Committee meeting and discussion. Note that to the extent possible, each step of the process should be completed for all candidates before the Committee makes the decision about which candidates to move forward to the next step. For example, review the application materials of ALL the candidates and THEN decide which of them the committee wishes to move to the next step.

Initial Interviews

The next step is usually a video interview. The Search Committee chair should contact the candidates who have been moved forward and arrange an interview at a time convenient for all parties. Let the candidate know how much time to allot for the interview and which video method will be used. If the committee schedules two of these initial interviews on the same evening, be sure to leave time in-between to review the first interview before moving to the second.

To the degree possible, the entire Search Committee should be present for all these interviews. When scheduling interviews in different parts of the country, pay attention to time-zone differences. Allow between forty-five minutes and two hours for the call. All committee members should review copies of the candidate's application material beforehand.

If the committee is not already comfortable with the video conference process, then doing a "dry run" is a good idea. It may be helpful to designate Committee members to be note-takers. One way to do this would be to assign one topic to each member, and have that person take notes of each Candidate's discussion on that topic. See Appendix page 28 for more interview tips.

Topic areas for the interviews are prepared in advance, with assistance as needed from the Canon or Search Coach and agreed to by the entire Committee. Based on the agreed upon

topics, each committee member should think of questions that they would like to ask. Rather than asking open-ended questions about hypothetical situations, ask how the candidate has handled ministries and issues in the past. Past behaviors are the best indicator of future behaviors.

Review a compiled list of questions and develop a single list so that each candidate is asked about the same topics. Depending on each candidate's portfolio, you might individualize some questions for each candidate. Decide who will start the conversation, make introductions, and ask the first questions. Watch your time closely. One person should oversee the conversation. Try to let each committee member ask a question or two. Remember you cannot ask every question, so choose those that are most important to your parish. See page 28 of the Appendix for topic and question suggestions.

It is also important to know what you cannot ask. These include questions about age, physical characteristics, disabilities, chronic illnesses, and national origin. You may already have some of this information in the candidates' portfolio, but federal laws govern what cannot be asked of any candidate.

In preparing for the interview, remember that you will also be asked questions. It is best to think about these in advance and designate someone to answer them. See Appendix page 30 for questions that candidates might ask. Then before ending the call, let the applicant know what happens next and when you will next make contact.

Committee members should have been taking notes during the interview and recording their impressions. When all interviews of this type are complete the Search Committee should come together again in person to compare notes, talk over their impressions, and narrow the field. Try not to have this conversation on the same day as the interviews. Give the committee members time to mull over what each candidate had to say and to pray for discernment. Depending on how many candidates there are, the committee may decide to do a second round of video interviews before selecting those to advance to the next step (Reference Checks). The need for a second round of video interviews is rarer these days as the number of applicants for each position are fewer in number than in years past. But still, in-person visits are expensive, and you may not want to make more than a few.

Why are there fewer applicants than in years past? There are two main reasons. One, there are fewer priests available for each position. The number of priest retirements has exceeded the number of priest ordinations for several years now. But also, two, with the advent of the Internet, priests considering a new call can do so much more research about parishes, communities, and Dioceses, than ever before, which allows them to carefully target their search rather than applying more widely.

Communicate with Applicants

All along the way, soon after a decision has been made to eliminate an applicant or to continue with an applicant, the applicant should be informed. The information should be given to them in the same format as the last communication. So, if an applicant is eliminated in the first review before video interviews, you may simply send them a letter. See sample in Appendix page 31. Whatever the decision, after the video interview a committee member, preferably the chair, should call the applicant and let them know if they have advanced or not. If they have not advanced, be prepared to offer them constructive feedback on their interview skills if they ask for it, but you do not need to give them a specific reason for their elimination, they have simply not been included in the next step.

Reference Checks

When advancing candidates are contacted to let them know, if they have not already provided a list, ask each one for at least three references (besides their Bishop and/or Canon) who may be contacted by phone. It is preferable that at least one of the persons be a current parishioner of their church. The others might be someone with whom they have worked or studied. If they have already provided names on their resume or in their portfolio, verify with the candidate the contact information and that it is alright to call them. Assign one person per candidate to make the reference check phone calls, others may listen in if desired, but it is not necessary. Ask the same questions of each reference and record the answers and impressions. See Sample Reference Check form in the Appendix, page 31.

Site Visit to the Candidate's Congregation

While it is true that reference checks rarely eliminate a candidate, they do give the committee a better picture of the candidate and may identify an area or areas that should be talked about. Following the reference checks, the Committee again meets, and discerns whether it feels drawn to continue the process with the candidates. Once again, this should be a careful, prayerful, in-person discussion. Bear in mind that the candidates are making the same decision.

The stakes are getting higher now because up to this point, the process has cost little or no money, and the candidate has not had to disrupt their normal life. The site visit is different, and discernment goes in both directions, it is sad, but it does happen that a good candidate will, for their own reasons, withdraw from the process. At this point in the process, it helps to assign each candidate a primary Search Committee contact. The primary contact should, in conversation with the candidate, ascertain their continued interest, and carefully coordinate the site visit.

Every effort should be made to maximize uniformity among the site visits. Develop a definite plan of questions to be asked, with only modest modifications for each candidate. Two to three members of the committee should make the visit. They should plan to attend worship, meet informally (perhaps over a meal) with the candidate and spouse or partner, and conduct a formal interview with only the candidate where the preplanned questions are asked.

The purpose of this visit is to see whether the candidate's actual ministry aligns with their self-description, and how that ministry is experienced. Take full advantage of this visit to gather in-depth impressions and observations. If the priest is the rector of this congregation, what is the state of the physical plant. Even an old, in need of repair building can be neat, tidy, and without outdated material lying around. Consider the service leaflet, newsletters, bulletin boards, the sermon you heard, and how the congregation greets you, the stranger in their midst, as well as how they interact with the priest. Remember this interview must be kept confidential too. Ask the candidate how to best blend in and not be "spotted" as a Search Committee.

Observe the courtesies that invite candidates to remain in conversation with you.

- a) Pay for all expenses involved in the site visit
- b) Make clear the remaining steps in your process
- c) Tell the candidate when they may next expect to hear from you
- d) Primary contact writes a thank you note immediately upon return from the site visit.

Each visiting team should write a visitation report (See Sample in Appendix page 32) of the visit as soon as possible so as not to lose or misremember any details and share the report with the full Search Committee. About a week after the visit, the primary Search Committee contact should call the candidate to discuss whether the candidate has continued interest. When all site visits have been made, the Search Committee should meet again in person to share the experiences and impressions each team had. Then together and prayerfully the Search Committee decides on the final candidates.

Depending on the number of candidates who were visited, it may be that all are included as finalists. It is probably enough to have no more than three finalists, but each committee, depending on the charge they received from their Vestry, must make their own determinations. Once the finalists have been decided upon, provide that list to Hannah Jarman or the Canon at Diocesan House. They will arrange for background checks and the Bishop will make his "Bishop to Bishop" phone call(s). This process can take up to 60 days but is often complete well before that.

Parish Visit

Next, the Search Committee will invite the remaining (Bishop-approved) short-listed candidates (and spouses, partners) to your parish for interviews with the entire Search Committee. This visit should include a personal interview with the candidate, a tour of the parish and surrounding community as well as social time. Although the committee should go to whatever lengths are necessary to prevent the candidate from “running into” parishioners, it is permissible to ask the candidate to preside over a Eucharist, give a sermon, and/or teach a formation class for the committee members. If this is desired, make sure the candidate is told what to expect when the trip is being arranged. Offer to make arrangements for the spouse or partner during the non-social time. Possibilities include spending time looking at schools or at housing, but it is a good idea to ask what they would like to see or do. During the visit you should arrange for the candidate and spouse to stay in a hotel, rather than hosting them in a committee member’s home. Be sure to allow time for the candidate to ask questions of the Committee, and some free time to look around the community. It may help to suggest that the candidate bring ordinary street clothes with them for when they are out and about.

Discernment

Discernment is the practice of seeking to identify God’s will and then moving with spiritual openness towards it. It is suggested that the Committee take at least a week between the final Parish Visit and the Committee Meeting that is dedicated to final discernment. During the week, each member of the Search Committee should pray for God’s guidance and for an open mind to hear from the other members. They then bring their own discernment to the designated meeting and share them with one another. At the meeting, take time to listen to one another prayerfully, without engaging in debate. Listen to one another speak of the candidate’s gifts and strengths and listen to one another speak of the ways that they might not be the person whom God is calling to your parish. Through whatever decision-making process that the Committee agreed to at their inception, work to reach a decision to make a specific recommendation to the Vestry.

Consensus

It is a wonderful thing when there is an “aha” moment and one candidate is the obvious consensus choice. This is not always possible, and sometimes the decision will be for some committee members one of “can I live with this person as rector?” It is most desirable that everyone be able to sign on to the candidate(s) nominated to the vestry. However, if it was not a clear unanimous decision, then before reporting the decision to the Senior Warden, live with it for a few days. Prayerfully ask God for confirmation of the choice. Take note if moving toward this conclusion brings a sense of peace, consolation, and rightness. This is a strong indicator it is of God. Then come together for a final decision. No process of discernment is

perfect, so we must work through such discernment always with less than perfect clarity. The practice works toward faithfulness even, as St. Paul reminds us: “we look through a glass darkly.”

If there was not a consensus, but the Committee decides to nominate the candidate to the Vestry, the vestry needs to know the number (not names) of people who could not support the priest whose name is being put forward. Ideally the vestry will also be able to come to consensus, but if that is not possible, the search has probably failed, and the Canon should be informed.

Finally, remember that the clergy world is a small one. How you treat your candidates, even those you do not advance, is evidence of your parish’s mindset and culture and is likely to get back to the other candidate(s). More than one candidate has rejected a position because of how the parish treated others.

PHASE 5 – MAKING THE CALL

When the Search Committee has reached a decision to nominate one or more candidates to the Vestry, the Committee Chair notifies the Senior Warden who then calls a special meeting of the Vestry. The Senior Warden may include the Committee Chair and/or the whole committee in the called Vestry meeting.

At this meeting, the Vestry should review the entire process of the Search Committee to satisfy itself that the Committee did its work thoroughly and prayerfully and that the Vestry understands the reasoning behind the recommendation. When/if the vestry decides, to take the Search Committee’s nominee, they then “elect” to call the candidate, and confirms with the candidate that they will take the call and set the compensation terms of the position. The wardens then provide to the Bishop written notice of the election of a Rector. (In the event the Vestry does not accept the candidate presented by the Search Committee, the Vestry and Canon, with the advice of the Bishop, will decide how to continue the process.)

The call is typically done in this manner, the Senior Warden telephones the candidate to extend the call and follows up with a hard-copy letter. The priest accepts the call – this is a continuum that begins with the priest says “yes!” and concludes when the Letter of Agreement is signed by the Senior Warden, the Rector-Elect, and the Bishop. (Again, in the event the priest does not ultimately accept the call, the Vestry, Search Committee, and Canon, with the advice of the Bishop, decide how to continue the process.)

The Search Committee telephones the other candidates to advise them that they have not been selected, thank them for their participation in the process, and offer blessings for their

continued ministry, without naming the priest who was chosen. This should happen at the latest when the priest signs the Letter of Agreement.

Letter of Agreement

In the days after the priest has said yes, the Senior Warden, contacts the Canon. She will email to the Senior Warden a list of questions to complete and return. The questions have to do with the new Rector's compensation, time off, duties and expectations, and the relationship between priest and congregation. When returned, LaTonya Smith, Diocesan Administrator, prepares a draft of the Letter of Agreement (LOA) for review. When the draft is complete and approved by the Bishop, it will be sent to the Senior Warden. Assuming no changes are needed, the Senior Warden signs the LOA and forwards it to the Rector-elect who signs it and returns it to Diocesan House. The Bishop then signs it and copies of the completed document are returned to both the Senior Warden and priest. See sample LOA in Appendix page 33.

Then – *but not until then* – the veil of confidentiality lifts (with respect only to the priest who has accepted the call.) The good news can go out, but the timing of it should be coordinated with the new priest who may have to announce their departure from one congregation even as they celebrate their call to a new one. Diocesan House will also make an announcement.

Finally, after the call is made, the letter signed, and the announcement sent, it is important to allow the new priest to spend a last few weeks focusing on the congregation they are leaving, so that they can say the same sort of good goodbye that we referred to in the very beginning, when the show was on the other foot.

Begin Transition

Before the new rector arrives, if there has been an interim in place, room must be made to end that relationship. As much notice as possible is given, so that the interim rector can get to what is next in their ministry. Salary and insurance coverage are to continue for as long as agreed to in their Letter of Agreement. Even as the congregation is celebrating with anticipation the call of a new Rector, a proper goodbye should be said to the leaving interim.

The grounds, building, and particularly the Rector's office should be made ready for the new Rector (See Appendix page 38 for a suggestion list), and there are other ways to get ready that will be most helpful when the Rector arrives.

Welcome

A committee or possibly several committees will be responsible for assisting the new rector in relocating, moving-in, and finding their way around the new parish. A reception ought to be

held after the first Sunday service. The wardens will want to thank the Search Committee at the reception. Soon a day-long vestry meeting or a weekend vestry retreat should be considered as a way of getting the new rector and the vestry all on the same page as the new ministry begins.

Celebration of New Ministry

As the new rector is preparing to arrive, or soon thereafter, in consultation with the Vestry, the Bishop's office is contacted and together they will set a date for the formal Celebration of New Ministry service. This service is normally held on an afternoon or evening during the week or on a Saturday so that other clergy and lay people from the diocesan community can attend.

Our diocesan standard for Letters of Agreement includes a Mutual Ministry Review (MMR) at or near the one-year anniversary of the Rector's start date. In an MMR, the rector's and parish's leadership is reviewed and evaluated in a spiritual and practical way. To be clear, this is not a performance review as is typical in employment situations. This is a method of evaluating the mutual ministry of congregation and priest and of setting goals and/or making changes as desired by all parties. Diocesan House will send the rector MMR tools to use for the process and the Canon is available to assist as needed.

This is a long and detailed process but done well it is also very rewarding. Remember you will not be alone. The Bishop, Canon, your congregation, and most importantly, our Lord will be with you every step of the way.

A Note of Thanks

Each of us stands on the shoulders of those who have gone before. This document is not a wholly original work but borrows freely from the transition materials of other Episcopal dioceses, most notably the Dioceses of Georgia, Maine, Oklahoma, and Arkansas. The final product, however, is tailored to the policies of this diocese with new material added to that created by the above sources. We are grateful to the dioceses whose work helped shape this document.

APPENDIX

Item One – Sample Exit Interview Questions

1. Apart from Sundays, what skill did you use most here?
2. What ministry skill would you have added?
3. Describe was a typical week for you?
4. What is the biggest challenge the next priest will face?
5. What big challenge is the congregation facing?
6. What have you liked most here? Least?

Item Two – Search Committee Charge examples

Example One:

The Vestry's Charge to the Search Committee

- The search for a new Rector is a prayerful journey, undertaken with thoughtfulness and open hearts and guided by the Holy Spirit of God. The Vestry is grateful for your willingness to serve.
- Understand that all personal information about applicants including name, age, place of origin etc. is to be held in strictest confidence even after the search is complete.
- Develop a Collect to be used in our liturgy for the duration of the search and share it with the congregation
- Using the Self-Study materials provided by the vestry, develop a portfolio document in consultation with the Transition Ministry Officer of the Diocese of East Carolina, which tells the clear story of this congregation's life and ministry for use in marketing the position of Rector of Name Church.
- Engage the members of this parish in careful conversations and open forums to intentionally seek stories and experiences relevant to developing the portfolio document.
- Rely on The Transition Ministry Officer to provide the Search Committee with resources, training, and methods for this work.
- Let daily individual prayer and group prayer become an essential part of your service on this effort. Work together to discern the will of God for this community. Establish a Chaplain to help ensure the Search process of

discernment and deliberation is centered in prayer.

- Assist the Vestry in ensuring a high quality and up-to-date web presence, which well represents the parish and its life and ministry.
- Establish a calendar of scheduled meetings; establish a communications plan to provide progress reports to Vestry and parish, using all available means. Adhere to the budget provided in consultation with the Vestry.
- Receive confidential information from the Transition Ministry Officer, work carefully with interested clergy, and mutually discern a quality priest who may be elected by the Vestry as our next Rector. The Search Committee will present information on their process, their discernment, and their candidate to the Vestry when their work is completed. With caution that the process in no way be limited or impeded, the search committee would strive to present their candidate within [HOW LONG] of their first meeting.
- Work with the Transition Ministry Officer and Bishop in the completion of this call by notifying the Bishop of finalists at least 60 days prior to any election, initiating background checks on candidates presented (paid for by the Parish subsequent to presentation) and receiving information and best practices for executing this work as the process unfolds.
- Make recommendation to the Vestry of 1,2, or 3 (how many names) final candidates.
- Support the Vestry's decision without discussion in the parish.

Example Two – Sample Charge to Search Committee

Date, 2020

To: Search Committee

From: Vestry

The following sets out the understanding between the Vestry and Search Committee and communicates the objectives and responsibilities of the Search Committee in the filling of the Rector position at Special Name Episcopal Church, Great Place, North Carolina.

In the absence of a Rector it is the responsibility of the Vestry and Wardens to:

- Secure the services of clergy during the interim time

- Appoint and charge a Search Committee
- Provide both a scope (“charge”) and a budget for the search
- Maintain the congregation while the search is being conducted
- Develop a compensation and benefits package for the new Rector
- Ultimately elect and call a new Rector
- Negotiate the package and Letter of Agreement with the new Rector

The Vestry places its faith and support with members of the Search Committee to join in spiritual discernment to seek God’s will for this congregation and assume the following responsibilities on behalf of the Vestry:

- Request the Vestry for appropriate assistance when needed throughout the search process
- Establish, and revise periodically as necessary, a projected timetable for fulfillment of the Search Committee’s responsibilities and provide to Vestry for information only.
- Communicate the progress of the Search Committee regularly to the parish through announcements, bulletins, and newsletter articles
- Determine the format for the parish’s self-study to be completed by an appointed date, preferably. The conversations for the self-study should include a mixture of congregation-wide and focus group discussion. Questions for facilitated discussion to be determined by the Search Committee to explore what members love and hope for in the parish, the challenges it faces, and their expectations for the next clergy leader
- From the self-study, provide Vestry with prioritized expectations for the role of the Rector to enable comparison with financial condition and to complete the applicable financial package.
- Develop a Parish Profile which tells the story of the parish: demographics, needs, community environment, history, vision, dreams, and mission
- Complete the Office for Transition Ministry (OTM) Community Portfolio
- Provide Profile & Community Profile to Vestry
- Develop and implement a process for screening candidates including written questions, reference checks, telephone interviews, visits and interviews with final candidates
- Develop a uniform system of rating and ranking candidates
- The Committee will keep confidential any information obtained during the ensuing search process that concerns specific potential candidates

- With the assistance and guidance of the Bishop and the Canon for Diocesan Life & Leadership of the Diocese of East Carolina, (and the OTM) conduct a search, without regard to age, gender, race, disability, sexual orientation, or nationality, for a Rector who will be an effective leader in the parish
- Communicate with candidates promptly their status in the process
- Recommend one final candidate to the Vestry for election and call

_____ Senior Warden

_____ Junior Warden

_____ Chair Search
Committee

Item Three: Writing A Parish Search Collect

A Collect is a prayer in which the phrases are arranged in a specific pattern.

Just as there are many different types of poetry, there are many literary forms of the different types of prayer. One is the Collect.

Most Collects are short, only a single sentence. Not every short prayer is a Collect. The main thing that makes a prayer a Collect is its pattern.

The Collect has a five-part pattern. The *initial phrase or Address* calls upon God. An *Ascription* follows, mentioning some particular quality or gift of God (for example, in the collect on page 236 of the **Book of Common Prayer**, there is the clause “who caused all holy Scriptures to be written for our learning”). Next comes the *Petition* (an asking), then the hoped-for *Result*, and finally the *Doxology* (praise). Here is an example of Collect form, using the contemporary Collect for Proper 28.

ADDRESS	Blessed Lord,
ASCRPTION	who caused all holy Scriptures to be written for our learning:
PETITION	Grant us so to hear them, read, mark, learn, and inwardly digest them,
RESULT	that we may embrace and ever hold fast the blessed hope of everlasting life,

which you have given us in our Savior Jesus Christ;

DOXOLOGY who lives and reigns with you and the Holy Spirit, one God, for ever and ever. AMEN.

CRITICAL QUESTIONS FOR THE CONSTRUCTION OF THE PARISH SEARCH COLLECT

ADDRESS How will you address God?

ASCRPTION What gift has God given your congregation that is of importance here?
What guidance has God given in the past?
For what part of the nature of God are you grateful?

PETITION What are you asking?

RESULT What are your hopes from this?

DOXOLOGY How do you praise God in this?

Item Four – Overview of Diocesan Standards for Benefits

Health, Dental, and Life Insurance for the clergy person and negotiable for family

Church Pension Group pension as required by The Episcopal Church

Vacation, 23 weekdays and 5 Sundays (may prorate first year)

2 weeks, including 1 Sunday for Continuing Education, and some dollar amount in the budget to support the effort

Reimbursement for business related items purchased by clergy person for use in act of employment, including auto expenses or allowance

Smartphone with reasonable data plan, number published to the parish or phone allowance

Two weeks earned for every year of employment toward Sabbatical. Timing of Sabbatical must be approved by Vestry and Bishop

Initial Moving Expenses, may set upper limit, (check out the tax implications of this)

Item Five – Sample Liturgy for Commissioning Search Committee

May be reproduced for the service bulletin. This usually occurs following the homily, Creed and Peace at the Eucharist. The congregation is seated, the celebrant stands in full view of the people. The Wardens and Committee Members stand with the celebrant, who says these or similar words.

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

Wardens: We present these persons to be admitted to the ministry of Search Committee.

The Celebrant asks the Wardens: Are these persons you are presenting prepared by a commitment to Christ, 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 his Church?

Wardens: We believe they are.

The Celebrant says these or similar words to the Search Committee members: You have been called to a ministry in this congregation. As you are engaged in this work, will you perform it with diligence?

Committee Members: I will.

Celebrant: Will you faithfully and reverently execute the duties of your ministry to the honor of God, and the benefit of the members of this congregation?

Committee Members: I will.

Celebrant: Let us pray. O Eternal God, the foundation of all wisdom and the source of all courage: Enlighten with your grace the Search Committee of this congregation, and so rule their minds, and guide their counsels, that in all things they may seek your glory and promote the mission of your Church; through Jesus Christ our Lord. *Amen*

In the Name of God and of this congregation, I commission you as Members of the Search Committee in this parish. *Applause is appropriate. The service continues with the usual opening for the Holy Eucharist.*

Item Six – Sample Cover Survey Cover Letter

Date

Dear Friend,

Grace and peace to you from God our Father and from the Lord Jesus Christ! As many of you know, we are currently in the search process to find our next rector for St. Swithins. A Committee has been formed to determine the needs of our parish and produce a parish profile, and to screen and interview candidates for our new rector, finally making one recommendation to the vestry. There are many steps to this process—but perhaps the **most important** is determining what qualities our parishioners would like to see in our new rector. We would like to ask for your help by your completing the attached survey, or to participate in another way.

Instructions for how to complete the survey or to participate in a focus group or to attend a meeting here.

We will use the results to put together a parish profile: a picture of ourselves, what we hope to become, and most importantly the kind of rector we will call. This profile will be sent to each candidate for rector and will also be made available online to each of you!

We value your input. Please help us by completing the online survey by Date. Thank you in advance for being part of this exciting time in our parish's life.

Sincerely,

St. Swithin's Search Committee

Item Seven – Interview Tips, Topics and Questions

Interview Tips:

Make sure to tell the candidate that this is the time to “brag” about themselves, humility is a wonderful trait in most cases, but it can make it difficult to learn a person's accomplishments.

The best indicator of what a person WILL do is what that person HAS DONE.

Therefore, the structure of each question is best phrased as...

- Please tell us about a time when you . . .
- How do you (or have you) done . . .
- What have you found to be the best way to . . .

After posing a question, it is best to simply listen. The longer we listen the more evidence we gather. Extend the original evidentiary question to elicit more evidence with encouragements such as:

- That's interesting, please keep going . . .
- We're getting a really clear picture; can you tell us more?
- Can you give us another example along the same lines?

Sometimes one seems to get more "theory" than hard evidence such as these statements: (a) "Well, I always believe in participation." Or (b) "I want to bring out the best in people." What you want to know, is how they do that. So, ask:

- Could you help us with a specific example of this?
- What was the outcome of this?
- What difficulties did you overcome?
- What part did you, personally, play?

Remember it may take candidates one or two "false starts" before they draw out the best example. Be patient and encouraging.

Sample Topic Areas and Questions for Interviews

General Questions

- Tell us something about your career goals.
- At your present/most recent parish, of what accomplishments are you most proud?
- Tell us about why you would now consider leaving your present position.

Spiritual Development

- How do you keep your own life spiritually nourished?
- Tell us about any spiritual programs for individuals or groups you have developed and how you implement them.

Worship/Liturgy

- How do you go about planning a service? How do you involve youth, the congregation, or other special groups in the service?
- How do you develop your sermons? Describe your preaching style.

Pastoral Care

- Please tell us your approach to pastoral care. Tell us about an especially significant pastoral care relationship.
- How do you share the responsibility for this ministry with your parish?
- Please describe your ministry with special groups, such as hospice, the elderly, refugees, or others.

Christian Education

- Describe your training and experience in Christian education for young children, youth, and adults.

- At your most recent parish, how was Christian education implemented and what was your role?
- What was the most well-received Christian education program you implemented? What made it so?

Membership

- Tell about experiences you have had in trying to expand membership.
- What strategies have you found helpful in bridging the generation gap in the parish?

Stewardship

- Please describe your most successful stewardship campaign. Why was it the most successful, and what part did you play?
- How do you plan an annual stewardship program? Who do you involve and in what capacity?

Social issues

- How do you deal with social and political issues about which you feel strongly?
- Describe any experience you have had with division in a congregation over social issues.
- If the Episcopal Church takes a position with which you disagree how might you (or did you) proceed?

Administration

- Tell us about your administrative experience.
- How would you describe your leadership style?
- How were/are tasks and goals set, and assignments made? How do you measure the effectiveness of programs and ministries?
- Describe your experience, if any, in firing someone. What was effective and ineffective?
- Describe your working relationship with the Diocese and the National Church.

Relationship with Vestry

- How have you experienced your relationship with the Vestry/Vestries? How might they describe your style of working with them?
- Do you and your Vestry participate in an annual Mutual Ministry Review?
- How have you handled disagreements?

Item Eight – Questions Candidates Might Ask

- Why are you interested in me as a candidate?
- What role do you expect my family to play in your church?
- What concerns need to be addressed in the congregation and community?
- What significant events and people have shaped your church?

- What is your vision for your congregation?
- How has this parish recovered from conflicts in the past?

Item Nine – Sample Letter to Priests Not being moved forward

Dear [Name]:

On behalf of the Search Committee, I would like to thank you for your interest in [Church Name]. All of us are deeply impressed with the gifts you bring to the church’s ordained ministry. We appreciate the time and effort you took to make these gifts known to us.

The Search Committee had the very difficult task of moving forward with a few candidates for the position of Rector out of a pool of extremely qualified and talented individuals. I regret to inform you, that after prayerful and deliberate review, the Committee decided not to include your name on the list.

The whole Search Committee joins me in sending continuing best wishes and prayers for God’s strength and presence in your ministry.

Faithfully yours,

[Name], Chair
Church Name Search Committee

Item Ten – Sample Form for Telephone Interview with Candidate’s Reference

Candidate: _____

Interviewer: _____

Reference Contacted: _____ Phone #: _____

Relationship to Candidate: _____

1. What are his/her major strengths?

2. In what areas of ministry do you think [NAME] has growing edges?

3. Do you believe that [NAME] is qualified to assume a leadership role in a multifaceted church? (Reference may ask for background/clarification)

4. How do you see [NAME] relating to a team ministry? (Follow-up question: do you envision the candidate having difficulty working in conjunction with traditions?)

5. How would you describe [NAME's] leadership ability/style?

6. How would you describe [NAME's] organizational skills?

7. How does [NAME] work with youth and young adults in their present position?

8. Understanding that no one is perfect, in what areas would you say [NAME] struggles?

9. Is there anything else you can tell us about [NAME] from a professional perspective, which might be meaningful?

Item Eleven – Sample Search Committee Visitation Report

Following are some of the things you may want to look for as you visit candidates in their own parishes. Try to be observant of others attending the service as well as noting your own reactions to the service, the sermon, and the church itself. The more specific you can be in your observations, the more effectively you will be able to compare your reactions to those of the others on the Search Committee.

What was your evaluation of:

- Sermon? Both your thoughts and feeling reactions are helpful to note.
 - How did you feel? Bored? Disinterested? Inspired? Guilty? Ready to do something? Excited? Angry? Happy?
 - What were your thoughts? Challenged? Confused? Clear? Stimulated?
 - Did they preach from the pulpit? Where?
 - Did you: Want to talk about the ideas? Hurry home to do something else?
 - What did you think about the candidate's:
 - Organization of ideas?

- Easy to follow? No clear, main message? Good examples that remind you of your own life experiences? No examples at all? Related well to Scriptures?
 - Didn't seem to relate at all? Too political? Not aware of social issues?
- General conduct of service?
 - Were there lay people involved?
 - How many?
 - Children? In what ways?
 - Is that appealing to you?
- Liturgical Style?
 - Vestments? Sung Service? Said Service? Incense? Gospel procession?
- The Church itself?
 - In need of repair? Clean? Fresh flowers? Dingy? Well cared for?
- What did you think about the candidate's:
 - Talked to people as they left church?
 - Friendly, went out of the way to meet new people?
 - Talked mostly to one or two people?
 - Cordial but did not go out of the way to meet people?
 - Seemed to know a lot about the people they greeted?
- Manner of meeting people?
 - Formal handshake?
 - Warm words with open smile?
 - Seemed shy but cordial?
 - Hugged someone?
 - Greeted children?
 - Ignored children?

Item Twelve – Sample Letter of Agreement

This sample is for information only. Using the information that you will provide to LaTonya Smith, Administrator of the Diocese, she will produce the formal Letter of Agreement.

LETTER OF AGREEMENT

Between the Bishop of East Carolina,

The Wardens and Vestry of

Name Episcopal Church, City, North Carolina

and

The Rev. NAME NAME

who has been elected as Rector with the understanding that this tenure is to continue until the relationship is dissolved by mutual consent or by arbitration and decision as provided by relevant Canons of the Diocese of East Carolina and of the General Convention of The Episcopal Church.

PREAMBLE

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

The ministry may be further described in a Rector Position Description approved by the Rector and the Wardens and Vestry of Name Episcopal Church, which is hereby acknowledged and made part of this Letter of Agreement. A copy of any such Position Description will be forwarded to the Office of the Bishop along with a signed copy of this Letter of Agreement.

SECTION A - TIMES OF WORK AND LEAVE

- (1) The Rector's work includes not only activities directed to the parish and its well-being, but also labors on behalf of the Diocese and community. In accord with her ordination promises, the Rector shall participate in the councils of the Church. In the Diocese of East Carolina, this work includes such items as the canonical requirements of Annual Diocesan Convention and Deanery Council, as well as Clergy Conference.

The Rector's regular work week is five days, undertaken in a combination of morning, afternoon or evening hours in a variety of settings to accomplish the work of this ministry. The Rector is expected to preserve appropriate times of rest and refreshment, including two twenty-four-hour periods each week solely for personal and family use.

- (2) The Rector will have the following periods of paid leave at full compensation:
 - (a) National Holidays, as determined annually in conversation with the Vestry and taken so as not to interfere with worship on major feasts or fasts.
 - (b) One Month Annual Vacation consisting of twenty-three weekdays and five Sundays. To encourage the Rector to take vacation time, no more than 5 weekdays and one Sunday may be carried forward to any succeeding year. Vacation time is taken in consultation and planning with the Vestry and other leaders.

- (c) Professional Development Leave, at the rate of two weeks per year, with time carefully worked out with the Vestry and other leaders so as to provide for the ongoing care of the parish.
- (d) Six weeks Parental Leave for the period immediately surrounding the birth or adoption of a child to the Rector, beginning at a time decided by the Rector and Vestry.
- (e) Medical, Bereavement, or Other Leave: In recognition that from time to time the Rector may be unable to perform the duties as set forth above due to serious illness, or the serious illness or death of family member, the following leave may be granted upon application to the Vestry:

Up to two weeks of paid sick leave in the course of the initial 12 months of his agreement and evaluated annually. Sick leave does not accrue from year to year, and unused sick leave has no financial value.

In an extraordinary situation of prolonged illness, in order to remain eligible for such leave, the Rector agrees, if needed, to discuss with the Bishop and Vestry such medical information as may be helpful.

Any additional paid or unpaid leave in excess of that set forth above, may be negotiated between the Rector and Vestry, but must be approved by the Bishop of East Carolina.

- (f) In accord with diocesan policy, two weeks per year of service in this parish Sabbatical Leave, to begin accumulation after the first year of service as Rector, and cumulative through the sixth year of service. Sabbatical arrangements, available from the fourth to sixth year, shall be made in full consultation with the Vestry, to insure benefits for the parish as well as for the Rector. Unused sabbatical time is not compensated financially. The Rector and Vestry are advised to prepare financially for Sabbatical by setting aside supporting funds annually.

SECTION B – COMPENSATION and BENEFITS

- (1) The Rector's annual cash compensation will be \$XX,XXX (inclusive of Salary, Housing value and Utilities and Annual SECA reimbursement) paid monthly, to be reviewed and adjusted annually in light of changes in the current Consumer Price Index and the recommendations of the current Diocesan Compensation and Benefits report.
- (2) Payment made on behalf of the Rector's portion of SECA (Self Employment Contribution Act) are included in the annual cash compensation calculation upon which pension is based. The Rector shall be responsible for including self-employment tax in his estimated taxes or asking that the amount be withheld from her paycheck as over-withholding of Federal Income Tax. The Rector shall be responsible for completing the 1040SE (the report and calculations of the self-employment tax with his annual Income tax return).
- (3) The Vestry shall pay the following benefits, in accord with the canons of The General Convention of the Episcopal Church and the Diocese of East Carolina:
 - (a) Church Pension Fund Assessment on the sum of: The Rector's annual cash stipend (\$XX,XXX), the Rector's SECA Reimbursement (\$X,XXX), and the actual cost of the total

housing and utility allowance (\$XX,XXX). Travel or continuing education expenses are NOT included in this calculation.

- (b) Health and Hospital Insurance will be provided for the priest, through the Church Medical Trust, including Dental Insurance
- (c) Term life protection insurance as provided through the Diocesan group life insurance policy is mandatory for clergy. The amount of coverage shall be equal to two times one year's pension-based compensation (the sum upon which Pension Assessments are based in 4a of this section), rounded to the nearest thousand. At certain compensation levels, federal tax law can generate an imputed income tax liability related to life insurance benefits of which the priest should be aware. Church Pension Group has resources related to this for active clergy.

SECTION C - OPERATING EXPENSES

The Vestry shall reimburse the following expenses incurred by the Rector in fulfilling the duties of the office:

- (1) The normal expenses of the church's office operation, such as telephone, an up to date computer, postage, office equipment, supplies, necessary secretarial services, etc. The parish will provide a monthly cell phone allowance of \$XX and this telephone number is published to the parish for emergency use.
- (2) Travel expenses, based on IRS regulation, plus out-of-pocket costs of parking fees, tolls and bus fares, annual convention housing and travel, etc.
- (3) A Professional Development Allowance of \$X,XXX will be budgeted per year, to be reviewed annually, set aside January 1 each year in a special account, and paid to or on behalf of the Rector toward expenses incurred in relation to Professional Development Leave. Unexpended portions of this allowance shall be allowed to accumulate for use in succeeding years up to six years (should the tenure of this agreement extend beyond the first three). It will only be paid for Professional Development of the Rector while he is serving as Rector of the parish.

SECTION D - SUPPLEMENTARY COMPENSATION

The Rector shall not charge fees for performing any rites of the Church (for example, baptisms, marriages, funerals) for members of NAME Episcopal Church. The Rector may, however, receive income from other sources such as:

Sacramental services on behalf of persons not in any way related to NAME Episcopal Church.

Fees and honoraria for professional services performed on personal time for groups unrelated to Name Episcopal Church, or for sermons, books or articles published outside the parishes.

If this income is collected by the church and paid back to the Rector, it must be included on the annual W-2 form.

SECTION E - DISCRETIONARY FUND

The Alms and Contributions, not otherwise specifically designated, at the Administration of the Holy Communion on one Sunday in each calendar month, and other offerings for the poor, shall be deposited

with the Rector or with such Church officer as the Rector shall appoint to be applied to such pious and charitable uses as the Rector shall determine.

The Discretionary Fund shall be in the name of the congregation, shall remain with the congregation when the Rector leaves the parish and shall be audited annually in such a way as to maintain confidentiality concerning the use of the fund. Use and maintenance of the discretionary account shall conform to the Diocesan Policy on Discretionary Funds and the national Manual of Church Business Affairs.

Section F- USE OF BUILDING

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

SECTION G – MUTUAL MINISTRY REVIEW

The Rector, Wardens and Vestry agree to an annual discussion and mutual review of the total ministry of the parish, in order to:

Provide the Rector, Wardens and Vestry opportunity to assess how well they are fulfilling their responsibilities to each other and to the ministry they share.

Establish goals for the work of the parish for the coming year.

Isolate areas of conflict or disappointment, which have not received adequate attention and may be adversely affecting mutual ministry.

Clarify expectations of all parties to help put any future conflicts in manageable form.

The mutual ministry review process will take place at a designated time each year. Learnings from the review process will be shared in a written form with the Bishop Diocesan. The Office of the Bishop has resources for an informal initial Mutual Ministry Review for the first year of ministry.

SECTION H - OTHER AGREEMENTS

- (1) Start date is Month X, 2020; all pay, and benefits initiate on Month X, 2020.
- (2) The Letter of Agreement shall be made part of the minutes of the next Vestry meeting following its signing, and copies shall be given to each Vestry member.
- (3) This letter may be revised only by mutual agreement at the time of the annual ministry review, except that compensation and expense revisions shall be mutually agreed upon in a separate budget process.
- (4) In the event of the Rector's unfortunate and untimely death, all compensation and benefits from the parish shall continue to the surviving Spouse of the Rector for a period of two months.
- (5) All priests in new positions in the Diocese of East Carolina are expected by Bishop Skirving to attend orientation gatherings during the first two years of ministry in these settings. These orientations are specifically designed to help priests of all experience levels make the most of their transition experience and to help integrate them in the Diocese as well. Information regarding upcoming Fresh Start Gatherings will be sent to all participants in Month 2020.
- (6) Under canon law in the Episcopal Church, any clergy position may be filled only with the consent of the Bishop. If on the date of this agreement a background check on the Rector has not been completed and the Bishop has not stated that the results of the background check are

satisfactory, the Bishop's consent to the Rector filling this position is conditional upon the completion of a satisfactory background check on the Rector. In that event, should the Bishop, in his sole discretion, subsequently determine that the results of the background check are not satisfactory, this agreement is null and void.

- (7) This agreement is entirely an ecclesiastical document and as such is not subject to any review, interpretation, or enforcement by any secular authority, including but not limited to secular courts. This agreement is subordinate to the Constitution and Canons of the General Convention of The Episcopal Church and to the canons and policies of the Diocese of East Carolina, as they exist as of the date of this agreement or in the future. If the Rector and Vestry are in disagreement concerning interpretation of this Letter of Agreement, either party may appeal for mediation to the Bishop of East Carolina, or another mutually agreed upon third party, the Bishop remaining the final arbiter. The parties agree to abide by the Bishop's decision.
- (8) This agreement is subordinate to the Constitution and Canons of the General Convention of the Episcopal Church and to the canons and policies of the Diocese of East Carolina, as they exist as of the date of this agreement or in the future. In the even that this agreement is in conflict or subsequently comes into conflict with either of those sources, the Constitution and Canons of the General Convention of The Episcopal Church and/or the Canons and policies of the Diocese of East Carolina shall prevail.

_____	_____
Rector-elect	Date
_____	_____
Senior Warden	Date
_____	_____
The Right Rev'd Robert S. Skirving, Bishop of East	Date

Item Thirteen – Prepare for the New Priest's Arrival

Completing the following list will assist in the new rector being able to settle in both quickly and well:

- 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 director if there is one
 - A roster of vestry members
 - A copy of the budget and minutes of (at least) the last three vestry meetings
 - A directory of ministries if there is one
 - Copies of Letters of Agreement of current staff members
 - A schedule and list of the duties of office volunteers
 - A copy of any policies, procedures, or personnel guidelines
 - A copy of the parish bylaws
 - The last two or three issues of the parish newsletter, weekly news bulletin, and Sunday service leaflet
 - A roster of active committees
 - A copy of the diocesan customaries, from the Bishop's office
 - A map of the area
 - If there is an ECW or other guilds or groups (including the Altar Guild), provide a description of their activities and meeting schedule and their expectations of the rector
 - Supply key dates of upcoming parish events and what is expected of the rector at each one
- Assemble any passwords the rector will need to such as those to a computer, security system, WIFI, or special accounts.
- Any parochial liturgical customary or instruction manual for Eucharistic Visitors, acolytes, altar guild, chalice bearers, lectors, and intercessors along with current Sunday schedules
- Offer to provide tour of the building
- If the rector has a spouse, people need to offer to help get them situated in the community, perhaps help with employment matters, and general assistance.