

# Parish Transition Process for the Diocese of Massachusetts

Office for Transition Ministry & Deployment  
138 Tremont Street  
Boston, Massachusetts 02111  
Phone: 617/482-4826  
Fax: 617/482-8431  
[www.diomass.org](http://www.diomass.org)

## Canon for Transition Ministry & Clergy Deployment

Cynthia Hubbard, ext. 400  
[chubbard@diomass.org](mailto:chubbard@diomass.org)

## Administrative Assistant for Congregations and Clergy:

Clare Moffitt, ext. 495  
[cem@diomass.org](mailto:cem@diomass.org)

It is an essential part of the mission and responsibility of the Office for Transition Ministry and Clergy Deployment to assist congregations in transition during their discernment of new ministry and clergy leadership in the Diocese of Massachusetts. To that end, we make no distinctions on the basis of gender, race, disability, sexual orientation, age, or marital status.

The implications of this practice for your particular congregation should be addressed in the initial meetings with a representative of this office.

### **Guidance Prayer for New Ministry**

*O God, you know us better than we know ourselves. Guide us in our search for a new rector. Empower each one of us to use our unique ministries, to share openly and honestly our thoughts, to respect the opinions of others, and to encourage humility, patience and joy. Instill in us a vision of the Church's family; that guided by your Holy Spirit we will be united in love and joyfully accomplish this mission, through Jesus Christ our Lord. Amen.*

Revised - January 2012

The Episcopal Diocese of Massachusetts:  
*Inviting, Forming, Sending, Serving*

A Statement of Mission

As members of the Episcopal Diocese of Massachusetts we believe God in Christ is working everywhere in the world to heal, to reconcile, to love every person and all of creation into wholeness. Through the life, cross, and resurrection of our Lord Jesus Christ, the power of sin and death has been broken; life and hope is the new reality.

It is our mission to join in God's transforming mission. We will form our children, our young people, and our adult members, through prayer, worship, and scripture, to become followers of Christ that we might discern where God is carrying out this mission in our world. And we will send our people to serve with Christ, inviting everyone and all of creation to share in the just reign of God.

A Prayer for Mission

O gracious and loving God, you work everywhere reconciling, loving, and healing your people and your creation. In your Son and through the power of your Holy Spirit, you invite each of us to join you in your work. We, young and old, lay and ordained, ask you to form us more and more in your image and likeness, through our prayer and worship of you and through the study of your scripture, that our eyes will be fully opened to your mission in the world. Then, God, into our communities, our nation, and the world, send us to serve with Christ, taking risks to give life and hope to all people and all of your creation. We ask this in Jesus' name. Amen.

My Sisters and Brothers in Christ:

Before you plunge into The Parish Transition Process for the Diocese of Massachusetts, step back for a moment and think about the major transitions in our personal lives. Pick one significant transition in your life: from being single to being married, from being married to being divorced, becoming a parent for the first time, a transition to a new vocation or job, moving from middle age to old age, relocating your family to another part of the country, or any other significant transition in your life.

Now sit with those memories for a while. Try to remind yourself of what you felt at that time of transition. Were you anxious? Hopeful? Afraid? Where did you find your support? What surprised you about the experience? What did you learn about yourself during this transition? What did you come to know about God during this experience?

Often, even a few minutes of reflection on transitions reminds us that if we are open to the Holy Spirit, a transition can be full of God's grace and revelation. Remember all that Jesus learned of God's power and continuing presence in the wilderness when he left his relatively serene life in Nazareth in order to begin his public ministry. *Matthew 4:1-11; Luke 4:1-13; Mark 1:12-13.*

Transition in parish communities and discernment of call by clergy from the moment the rector leaves until the installation of new ordained leadership, and all the steps in between, can be an exciting grace-filled time. This guide is meant to support you during this time, and make possible the spiritual growth and renewal God desires for you as the opportunities presented by this transition unfold.

Your bishops, the diocesan staff, and lay and clerical leadership of the Diocese of Massachusetts will work closely with you to insure that qualified candidates are considered at every step in the process. Because inclusivity is always a sign of vitality in the church, our bishops are committed to the thoughtful consideration in your discernment process of candidates of other cultures, candidates of color, women, gays and lesbians, and the broad spectrum of theological opinion which is so much a part of the Episcopal Church. Recognizing the importance of clergy diversity to the life of the diocese as well as to the parish, the bishops may from time to time put forward candidates for consideration that fulfill this commitment.

Know of my prayers as you begin this time of exploration and discernment in the life of your parish.

Faithfully yours,

M. Thomas Shaw, SSJE



# Parish Transition Process for the Diocese of Massachusetts

## TABLE OF CONTENTS

<b>INTRODUCTION</b> .....	7
<b>SEPARATION &amp; PLANNING</b> .....	7
Notify the Bishop's Office .....	7
Provision for Clergy Leadership During the Transition .....	8
Saying Good-bye .....	8
If a Priest-in-Charge is Appointed .....	8
<b>CONGREGATIONAL DISCERNMENT</b> .....	9
If an Interim Priest is Appointed.....	9
The Search Consultant.....	9
The Search Committee.....	9
Self Study/Discernment.....	10
<b>THE SEARCH</b> .....	11
Timeline.....	11
The Vestry's Charge to the Search Committee.....	11
The Commissioning of the Search Committee.....	11
The Parish Profile .....	11
Filing the Position Profile for the Parish (OTM) Profile .....	12
Receiving Names .....	12
Communication and Confidentiality .....	13
Narrowing the Field of Candidates .....	13
The Short List.....	14
Oxford Document Background Check.....	14
Final Discernment.....	14
Bishop's Meeting with Final Candidates .....	14
<b>THE CALL TO NEW MINISTRY</b> .....	15
The Call .....	15
The Letter of Agreement.....	15
Honoring the Search Committee/Celebrating the Interim Ministry .....	15
Welcome.....	16
Celebration of New Ministry.....	16
Conclusion .....	16
<b>WHO'S WHO AND DOES WHAT DURING THE TRANSITION PERIOD</b> .....	17
<b>SAMPLE PARISH SEARCH CHECKLIST</b> .....	19

## APPENDIX

<b>APPENDIX A</b>	<b>On Leaving A Parish .....</b>	<b>21</b>
<b>APPENDIX B</b>	<b>Responsibilities of Transition Team .....</b>	<b>24</b>
<b>APPENDIX C</b>	<b>The Interim Priest in the Diocese of Massachusetts .....</b>	<b>25</b>
<b>APPENDIX D</b>	<b>The Priest-in-Charge Program in the Diocese of Massachusetts.....</b>	<b>28</b>
<b>APPENDIX E</b>	<b>Liturgy for the Ending of a Pastoral Relationship.....</b>	<b>32</b>
<b>APPENDIX F</b>	<b>Sample Budget for Search Process .....</b>	<b>34</b>
<b>APPENDIX G</b>	<b>Search Committee Job Description .....</b>	<b>35</b>
<b>APPENDIX H</b>	<b>Search Process Timeline .....</b>	<b>36</b>
<b>APPENDIX I</b>	<b>Search Options .....</b>	<b>37</b>
<b>APPENDIX J</b>	<b>Sample Charge from Vestry to Search Committee.....</b>	<b>38</b>
<b>APPENDIX K</b>	<b>Sample Liturgy for Commissioning Search Committee .....</b>	<b>39</b>
<b>APPENDIX L</b>	<b>Parish Profile Outline.....</b>	<b>40</b>
<b>APPENDIX M</b>	<b>Interviews, Interviewing Finalists &amp; Various Sample Questions .....</b>	<b>41</b>
<b>APPENDIX N</b>	<b>Ground Rules for Finalists' Visits to Parish .....</b>	<b>43</b>
<b>APPENDIX O</b>	<b>Rector's and Congregation's Mutual Covenant of Ministry.....</b>	<b>44</b>
<b>APPENDIX P</b>	<b>Farewell Liturgy for Interim Ministry .....</b>	<b>49</b>
<b>APPENDIX Q</b>	<b>To Welcome the New Rector .....</b>	<b>50</b>

# A GUIDE FOR PARISHES IN TRANSITION IN THE DIOCESE OF MASSACHUSETTS

## Introduction

This guide provides an overview of the transition that takes place in a parish from the time when one clergyperson departs and a new clergyperson is installed. The main steps in the process of defining parish identity and calling new clerical leadership are outlined in the following pages as an aid to vestries, congregations, and search committees in understanding this challenging period.

Throughout this time of discernment and change, the Bishops - through the Office for Transition Ministry (OTM) - support the parish by providing periodic consultation and written materials, identifying supply and/or interim clergy, recommending a search consultant to work closely with the self-study and/or search committee, and offering other guidance needed to bridge successfully into the next stage of parish life. Two way communication between the parish and the Bishops' Office is an essential ingredient of a successful search.

This document is intended as a road map of the transition process. (*See, A Road Map: Preparing a Congregation to Call a New Rector*). It is not, nor should it be used as, a step-by-step guide. Each congregational situation is unique and should be treated as such. The parish transition period for purposes of this discussion can be understood in four stages: 1) Separation & Planning, 2) Congregational Assessment, 3) the Search, and 4) Call to New Ministry.

## Separation & Planning

### ❖ **Notify the Bishops' Office**

It is important that the Bishop's Office be a part of the process from the very beginning. The transition process begins when the departing priest meets with the Bishop and they determine together when the announcement to the Vestry and congregation will be made. Generally between 60 – 90 days notice should be given. In the case of a retirement, 4- 6 months may be appropriate. As soon as the priest announces to the Wardens his or her intention to leave a parish, the Wardens will make an appointment with the OTM to discuss the state of the parish as well as their options in the upcoming transition period. (*See Appendix A, "On Leaving a Parish"*)

At this meeting, the Wardens report generally on the congregation and are briefed in turn on what typically lies ahead for a parish in transition. **The Wardens and Vestry are the formal and canonical leadership of the congregation during the interim period**; as such, they hold the responsibility of choosing a course of action best suited to their particular parish and situation. With the help of the Bishops' Office, the Wardens must make arrangements for the conduct of worship and pastoral care until an interim priest is appointed. When there is a gap in official ministries, the Wardens can secure names of supply clergy to fill in for the short term, on Sundays and when needed, from the Administrator for Congregational Development (**Clare Moffitt x 495**).

After the initial meeting of the wardens with the OTM, the Canon for Transition Ministry will visit the parish. The visit may take the form of a meeting with the Vestry and/or the full congregation. The Canon will explore the various search options (*see, Appendix I, Search Options*) and share with the Vestry (and Congregation) an overview of the search process as well. Once the Vestry and the Canon jointly determine an appropriate search option, the Canon will discuss what the parish can expect during the interim period.

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

Pursuant to the canons of the National Church, the Bishop, in conversation with the wardens, appoints a priest to provide clerical leadership. Depending on the particular needs of the parish, the Bishop (in consultation with the OTM) will appoint either an Interim priest trained in interim ministry or, as the case may be, a Priest-in-Charge to serve the parish during the transition period. The appointment is confirmed (or not) following an interview with the Wardens and/or Vestry. (*A description of the two interim positions of Interim Priest and Priest-In-Charge may be found at Appendix C and D.*)

Occasionally there may be an extended period of time between the priest's announcement of departure and the actual leave taking. At these times it may be appropriate for the Vestry to select a Transition Team. (*See Appendix B for Responsibilities of a Transition Team.*)

#### ❖ **Transition Preparation Resources**

In addition to a search consultant, the OTM will assign a Business Consultant at the beginning of the transition time to meet with the wardens, treasurer and any other appropriate people. This person will help the congregation understand the state of its current business and financial practices, ensuring that such canonical requirements as parochial reports, audits and assessment payments are up to date. **A parish cannot call new clergy leadership until these requirements are all met.** A review of financial results may also help a congregation ascertain the scope of its future ministry. The Diocesan Business Consultants are prepared to take the time to help guide a parish toward a place of vitality in preparation for new ministry.

#### ❖ **Saying Good-bye**

The Vestry, parish, and rector together should plan and carry out the farewell and celebration of the rector's ministry. Whether the priest is leaving because of retirement, a call to another parish, or even because of differences with the parish, the elements of the separation process remain the same. Much of the energy of the parish during this time should be devoted to saying "good-bye". Until the rector leaves, the primary tasks are to arrange an exit interview, plan the current rector's departure and provide opportunities for people to say good-bye in a celebratory manner. Occasionally, a parish may begin the search process before the departing priest leaves. Such a step should be taken only after careful consideration and conversation with the Canon for Transition Ministry. (*See Appendix A, On Leaving a Parish, and Appendix E, Liturgy for the Ending of a Pastoral Relationship.*)

#### ❖ **If a Priest in Charge is Appointed... (See Appendix D)**

## **Congregational Discernment**

### **❖ If an Interim Priest is Appointed... (See Appendix C)**

There are five development tasks of the Interim period: 1) Coming to terms with history, 2) Clarifying identity, 3) Raising up new leadership, 4) Renewing relationships with the diocese, if appropriate and 5) Welcoming new ministry. These tasks need not proceed in any particular order and may occur concurrently. (*See Appendix C for detail of developmental tasks.*)

### **❖ The Search Consultant**

A consultant/facilitator experienced in rector searches is assigned to the parish. The Search Consultant is engaged by the Vestry but is accountable to the Bishops' Office through the OTM for the search process. The Search Consultant meets with members of the Vestry at the beginning of the search process, explaining her/his role in the process, and then working primarily with the members of the Search Committee in guiding them through the search.

The consultant works with the Search Committee to plan and design protocols for the search, help fill out The Episcopal Church Office for Transition Ministry (TECOTM) parish profile, gather and interpret data, and develop questions and a design for the interview process. The Search Consultant serves as the principal link with the OTM in providing resources and guidance during the interim period and search process.

The consultant is indispensable in understanding some of the more perplexing aspects of a search and in streamlining the process. While every transition is unique, and every interim and search consultant different, it is helpful for the Interim Priest and Search Consultant to work together closely. E mail communications among the Interim, the Search Consultant and the OTM should be "cc'd" to everyone, and the Interim and Search Consultant should determine a system for being in touch, whether through a monthly or bi-monthly check-in or, at the very least, whenever the parish moves to a different stage in the search process (i.e. from self-study to receiving names, to no longer receiving names, to interviewing finalists etc.). The greater the communication among all constituencies, the greater the opportunity for a smooth transition time.

The parish is responsible for the fees paid to the consultant and should make an arrangement with the consultant for regular payment (*See, Appendix F, Sample Budget for the Search Process.*) If the cost of a consultant will place an undue burden on the congregation, the Senior Warden is encouraged to contact the Bishops' Office, through the OTM.

### **❖ The Search Committee**

Parish members may be invited by the Vestry to submit their names and other parishioners' names for consideration in the formation of a Search Committee by the Vestry. The composition of the Search Committee should reflect the parish's diversity, including people of different ages, race, and gender. Please note, this is not the time to recruit all those in the parish with human resource experience to become members of the Search Committee. Rather, the Vestry should attempt to select people with open hearts and minds who will be sensitive to the culture and dreams of the congregation as a whole and not be driven by particular agendas.

It is not appropriate that a priest, often retired, who is a member of the parish serve as a member of the search committee. Occasionally and only after consultation with the bishops may such a person serve as chaplain to the search committee, without vote.

It should go without saying that openly disaffected persons are generally not helpful to a search committee, nor is it appropriate for a member of the parish staff to serve on a search committee.

A good target number for the Search Committee is 8 - 12 members, and at least one member of the Vestry (whose term will cover the duration of the search) is encouraged to serve on the Search Committee as a liaison with the Vestry. This serves the purpose of keeping members of each body informed and "in synch". The wardens may serve *ex officio*, (i.e., not have a formal vote) and may observe Search Committee meetings when and as they wish. However, under no circumstances should a warden serve as chair or a voting member of the Search Committee.

(See "Search Committee Member Job Description, Appendix G) □

### ❖ Self-Study/Discernment

A discernment retreat for the Vestry and Search Committee is recommended as a fruitful undertaking during a search. The retreat encourages the participating members of both the Vestry and Search Committee to view their work as a spiritual journey, over the course of which decisions are made through prayer and reflection. The retreat is generally led by the Canon for Transition Ministry with the Search Consultant, in attendance if possible.

A Parish Search Prayer may also be developed for the whole congregation that invites a spirit of thoughtfulness, collaboration, and faith-building. Many committees ask one member to act as their "chaplain" so as to keep them spiritually grounded by beginning and ending meetings with prayer and encouraging the use of the Parish Search Prayer by the congregation throughout the transition period. Some parishes have found it helpful for the Vestry and Search Committee members to form prayer "partners" to pray for each other throughout the search.

In its first phase, the Search Committee will take an in-depth look at the parish—its history, its identity, its mission and goals. In a real sense, the parish first searches for *itself* before looking for a pastor: What kind of community is it? What kind of parish has it been in the past? What new shape is God calling it to become? How can the parish realize its vision of itself in the future and, ideally, under what kind of leadership?

The Self-Study is a kind of discernment of what the faith community is at its best, of the parish as the Body of Christ in a special configuration. It is at best an imagining of what God's dreams are for the community of the faithful.

The Search Consultant gives counsel to the search committee throughout this important stage. The Self-Study can take many forms, inviting the whole parish to participate by:

- Holding an Appreciative Inquiry Workshop;
- Conducting informational interviews within the congregation, in the community and with other churches;
- Delving into archives for historical material;
- Gaining demographic information on the area in which the parish is located;
- Reviewing past history, written and verbal, as supplied by older members; and
- Envisioning the future in focus groups by imaginative and creative exercises.

**The use of surveys or questionnaires as the tool for self study/assessment by the Search Committee is not recommended.**

## The Search

**A parish must have its financial affairs, including assessment, by-laws, audits and parochial reports in order and up to date before the Bishop will approve a call. The standard procedure is for a member of the Congregational Business Consultants to conduct a review and offer recommendations if necessary.**

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

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

### ❖ **Timeline**

Depending upon the particular circumstances of each parish, a search may be as brief as nine months or extend to a year-and-a-half or more. The Search Consultant can be useful in setting up a realistic timeline designed to achieve a balance between efficiency and a pace that encourages thoughtful discernment, caution and thoroughness. *(See Appendix H for a detailed time-line)*

### ❖ **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 *(See Search Options in Appendix I and Sample Charge from Vestry to Search Committee, Appendix J)* as well as the budget for the search itself. *(See Sample Budget for Search Process in Appendix F)*

The Vestry also must decide on the range of the compensation and benefit package that it will offer the new priest. Conversation between the Search Committee and the Vestry about the specifics of salary, benefits, and housing situation, is vital at this point in order to give an accurate description of the position to be listed by the Episcopal Church Office for Transition Ministry. There are diocesan guidelines to be followed in setting the financial terms, a full description of which is available in the annual "Guidelines of the Compensation and Benefits Committee," obtainable on-line at [www.diomass.org](http://www.diomass.org) or from the OTM. It is Diocesan policy that any full-time parochial priest must be paid at least the minimum total clergy compensation (TCC) – which includes salary and housing. Pension, health insurance and any other benefits – are in addition to TCC.

### ❖ **The Commissioning of the Search Committee**

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

### ❖ **The Parish Profile**

As part of the Search Committee's charge, the Vestry may request that a parish profile be written as part of the search process. We strongly urge the parish to create a tri-fold or similar size profile that briefly describes the personality, mission and ministry of the congregation, focusing on the uniqueness of the parish and the passions and gifts for ministry it is looking for in its next priest.

Such a brochure can then be sent to all inquiring candidates. Other details such as parish history, a listing of programs, parish ministries and personnel should be on the website. It is important to remember that the parish website is the first place potential candidates will visit and should be fresh, up to date and inviting. *(See Appendix L, Parish Profile Outline)*

It is the expectation of the Bishop's Office that the written profile or "story" of the parish be reviewed by the OTM before it goes to final publication. Many parishes choose to post their profile on their own web site, and the final copy, once received by the OTM, will be posted on the Diocesan Website as well.

The description of the parish contained in the document is meant to be a representation of the parish on which the Wardens, Vestry, Search Committee, and congregation agree. In the experience of discernment, reflection, collaboration, and self-definition, a parish "grounds itself" in its own reality rather than delineating the projected abilities of a new priest. The more honest and transparent a congregation is in telling its story, the greater chance of attracting appropriate candidates and the less opportunity there is for disillusionment following the call.

#### ❖ **Filing the Position Profile for the Parish (OTM profile)**

At the end of the Self-Study phase, the Search Committee, together with the Search Consultant, completes a "Position Profile" published by the Office for Transition Ministry in New York and provided by the Diocesan OTM. When complete, the Position Profile should be sent to the Canon for Transition Ministry for review and subsequent filing with the Episcopal Church's Office for Transition Ministry.

At this point the parish is said to be "Receiving Names" and begins accepting applications from interested priests. The OTM files the Position Profile with the Episcopal Church's OTM and receives the results of a computer-generated search soon after the formal listing (normally within one week).

The Bishop will then review the list prior to sending the priests' profiles to the Search Committee. Once the parish position profile listing is complete it will be available online to priests throughout the Episcopal Church who are in active search. In addition, the parish's listing will appear in the Episcopal Church's monthly Positions Open Bulletin.

The OTM will also list the opening in the "Transition Ministry Newsletter", in order for the parish to appear listed in this major national publication read by clergy in search. A listing appears also on the diocesan web site, in the monthly *FYI* diocesan newsletter, and the Massachusetts Clergy Association (MECA) newsletter. Search Committees should check with the OTM in advance to insure that precise deadlines are met in order for notices to appear in a timely fashion. Much of this information can be made known even when the parish is still in Self-Study.

#### ❖ **Receiving Names**

The Search Committee may receive names from the following sources:

- candidates themselves, who submit their applications directly to the parish;
- candidates recommended by parishioners;
- candidates recommended by the Office of the Bishop and the OTM;
- The Episcopal Church Office for Transition Ministry, which makes a computer match using the parish listing and portfolios of priests registered with their office.

### ❖ **Communication and Confidentiality**

Communication with the parish is essential. While the conduct of the deliberations and the names of nominees are confidential, it is important to communicate on a regular basis the progress of the process – even if that means simply informing the congregation that the committee will not be meeting for several weeks.

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

Members of the Search Committee should understand how important it is to maintain confidentiality as often prospective candidates have not yet informed their own congregations that they may be in search. For Search Committee members to do otherwise is to risk great damage, both to the candidates and to their parishes. It is very harmful to the integrity of the process if a Search Committee member “leaks” information to anyone in the parish 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.

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

Once the period of receiving names has passed, (generally 2-3 months) the Search Committee’s task is now to sort through the candidates’ material efficiently and yet not arbitrarily, to the end of narrowing the field to fewer and fewer applications and to create a “long list” of 10 to 12 serious candidates. Eliminating candidates on the basis of the Episcopal Church OTM alone is not a recommended practice unless it is clear from a close reading that the candidate is unsuitable. The supporting materials, such as candidates’ resumes and their response to short (no more than 4), well-written questions crafted by the committee members, helps acquaint them with the potential priest. The Search Consultant’s guidance is beneficial to following a process that is both thorough and faithful.

Once the Search Committee has developed the “long list”, it should be submitted to the Canon for Transition Ministry, along with the names and the dioceses in which the candidates are canonically resident. By reviewing the list of priests being considered, and conducting a preliminary deployment officer check, the OTM (and Bishop) are alerted to any issues that might prevent a priest from being considered for deployment. At the same time there may be candidates who have significant gifts that are not apparent “on paper”, and this information can be shared with the Search Committee where appropriate. **The Diocesan Office will engage in conversation with the Search Committee throughout the process and reserves the right to add names if the slate does not reflect the Diocesan commitment to diversity.**

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 long list of candidates by soliciting taped and/or written sermons for the committee to hear or read, reviewing references, and conducting telephone interviews. Once the list is reduced to 5 – 7 names, Search Committee members should plan to attend worship services in the candidates’ own parishes. *(See Appendix M for Interviews, Interviewing Finalists & Various Sample Questions)*

The number of parish visits is usually driven by time and cost – (i.e. if candidates are all serving in local parishes it is much easier to plan a visit). Committee members should be discreet when making such visits, and the “calling committee” should not include more than 3 – 4 persons since the parish

is often not aware that its priest is engaged in an active search. **Throughout the screening process, the Search Committee as a courtesy should notify in writing those candidates whose names are no longer under consideration by the parish.** 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 shows a lack of consideration for the candidates but also reflects poorly on both the parish and the Diocese.

#### ❖ **The Short List**

When the Search Committee has arrived at a short list of three or four names of final candidates, those names *with full private addresses* should be reported to the OTM and Clare Moffitt, Administrative Assistant in the OTM, so that a full background check on each candidate may be initiated. It is the usual practice of the Search Committee to invite the final 3 – 4 candidates to meet with the Search Committee at the parish. By reviewing the Episcopal Church OTM parish or position profile, candidates are acquainted generally with the financial terms the parish may offer, but during the final interview stages discussion of the financial package should take place. Candidates coming from outside the Diocese should particularly be made aware of the high cost of living (especially housing) in Massachusetts. *(See Appendix N, Ground Rules for Finalists' Visits to Parish)*

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

Background checks concerning sexual misconduct and criminal offenses are required for all clergy at any point of transition (pre-ordination, licensing, and employment) in the Diocese of Massachusetts. All finalists must have a complete background check. This differs from the preliminary background screening performed by the OTM that simply insures that candidates are priests in good standing.

**The time needed to complete a background check may be as long as 6 weeks. It is important for the Search Committee to understand that a background check can not be initiated until the Oxford Document Management Company has received the signed forms from both the candidate and the Bishops' Office.**

The parish is responsible for the cost of background checks, which vary depending on whether the candidate has previously completed a background check for the Diocese of Massachusetts or for Province I (New England). In such cases, the results may be transferred or updated, for a cost of \$30 or \$60, respectively. The cost of a full background check is \$160.

#### ❖ **Final Discernment**

The final stage of selecting a nominee is one of close scrutiny, prayer, and reflection. When the Search Committee reaches the time for consideration of the final 3 – 4 candidates, the Canon for Transition Ministry is available to take part in a parish service for the blessing of the Search Committee during its final discernment. This event may take place either with the Vestry or with the full congregation.

#### ❖ **Bishop's Meeting with Final Candidates**

At this stage, the Search Committee Chair will contact either Bishop Shaw's or Bishop Harris's office to schedule a meeting between each of the candidates and the bishop. The purpose of this meeting is to acquaint the candidate with the Diocese of Massachusetts and to establish a relationship with a bishop of the Diocese. This is normally done during the candidate's visit to the parish for the personal interview with the Search Committee. The Bishop may choose to give feedback to the Search Committee after meeting with the candidates. Search Committees need to understand that the bishops' schedules are often heavily booked and therefore should make their requests for appointments at least a month in advance of the candidates' visits.

## The Call to New Ministry

### ❖ The Call

Once the Search Committee comes to consensus on whom it wishes to recommend as the next rector of the parish, the name (or names) is presented to the Vestry for consideration and a vote of approval. The preferred pattern is to present one finalist to the Vestry unless the parish bylaws stipulate otherwise. Depending on the process to which the Vestry has earlier agreed through its charge to the Search Committee, exposure to the candidate(s) by the Vestry varies.

Some vestries meet the finalist(s) informally at a social occasion. Some vestries delegate the power of selection entirely to the Search Committee and accept its choice without meeting the candidate. The vestry should consult the parish bylaws at the time it issues its charge to the Search Committee to assure that the vestry's charge conforms to the bylaws.

Before proceeding to issue a call, the Vestry must notify the Canon for Transition Ministry who will inform the Bishop of the election. The Bishop must be notified in order to give the response required by national canons. **Please note no call may be issued or announced without the express consent of the Bishop.** 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. Announcement of the call needs to be scheduled to everyone's convenience—especially the candidate who must out of consideration inform the place that he or she is leaving.

### ❖ The Letter of Agreement

Details regarding the rector's terms of employment (amount of cash stipend, housing arrangements or allowance, moving expenses, benefits, and description of responsibilities) are negotiated with the Vestry and/or Wardens, and are later spelled out in a formal Letter of Agreement that is concluded between the parish and the clergy person who has been called. The Letter of Agreement is drawn up for signing by the new Rector and the Vestry. Before obtaining the necessary signatures, it is appropriate to send it to the Canon for Transition Ministry for review. After the signatures, it is then sent to the Bishop, for his/her review and signature. So long as there is general agreement on the terms, there is no requirement that the Letter be filed by a certain date. Its signing completes the process and concludes it formally.

Assistance from the OTM is available to assist in crafting a Letter of Agreement. A sample template is available at [www.diomass.org](http://www.diomass.org) in the Document Library. It also appears in the annual report of the Compensation and Benefits Committee and in *Appendix O*.

### ❖ 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 OTM. Materials left over from the search should be disposed of in an orderly fashion since much of it is confidential in nature and inappropriate for parish archives. Feedback from the Search Consultant on the experience of the search process and any aspect of it is usually welcomed by the Search Committee. Successful completion of the work of the Search Committee is also cause for celebration, either in the context of the parish or simply by the committee itself.

Recognition of the ministry of the Interim priest and bidding him or her good-bye merits the attention of the congregation at the end of the transition period. *(A sample farewell liturgy may be found in Appendix P)* The OTM encourages the departing interim to make an appointment for both an exit interview and to discuss future plans.

### ❖ **Welcome**

When the call has been issued and accepted, it is appropriate for the vestry to appoint a transition committee to serve as a committee of welcome, to introduce the new rector and his or her family to the community, to help in relocation and to assist in the beginning of the new ministry. The transition committee might plan coffee and dessert for small groups to assist the new rector in meeting people, provide groceries for the first week, see to it that the rector's office is ready to be occupied, or provide maps and contact information for example (*See Appendix Q, To Welcome the New Rector*). It is also important to notify the Dean of the respective deanery so that he or she may welcome the new rector as well.

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

### ❖ **Celebration of New Ministry**

It is customary shortly after the arrival and settling in of the new rector for the parish to schedule a Celebration of a New Ministry. The rite found on page 559 of the Book of Common Prayer is used by most parishes. The bishop will make every effort to officiate and preach at this service. If, however, given his/her schedule, this is not possible, the Dean is the celebrant on behalf of the bishop. Please remember to invite the clergy of the Deanery to participate as appropriate. It is a good way for the new rector to meet his/her fellow colleagues in ministry as well. We encourage also the invitation of those people who have been helpful throughout this process, including the search consultant, the interim priest, the Canon for Transition Ministry, and any clergy who have served the parish during the interim period.

### ❖ **Conclusion**

The new rector is in place, at last. This is in itself, a significant accomplishment but hopefully, it is not the only benefit a parish has received from its involvement in the interim process. Much of a parish's involvement and benefit depends upon the extent and enthusiasm of participation, and that, in turn depends upon the leadership of wardens and vestry. Many parishes report discovery of exciting new dimensions in their ministry, an increased sense of identity and purpose, newly identified resources in lay leadership, or a new recognition of its relationship with the bishop and the wider church. May all these blessings be yours, and many more.

## **Who's Who and Does What During the Transition Period**

### **❖ The Bishop**

The Bishop has ultimate responsibility for the ministry of all congregations in the Diocese. In a time of transition, the Bishop may meet with and advise the wardens as soon as the rector announces his/her departure either in person or through the Office for Transition Ministry. The Bishop meets with the departing rector for an exit interview, assigns diocesan resources to assist in the process, approves all final candidates and approves the election of the new rector.

### **❖ The Wardens**

The senior and junior wardens are the chief lay officers of the parish, responsible for many of the affairs of the parish in the absence of a rector. When the knowledge of an opening occurs or is imminent, the senior warden notifies the Office of the Bishop and maintains communication with the Office for Transition Ministry throughout the process. The senior warden (or in his/her absence, the junior warden) is responsible for working with the Canon for Transition Ministry to obtain interim and/or supply clergy, presides at the election of the rector and communicates that election to the Bishop, negotiates on behalf of the parish with the newly called rector and assists the new rector as his or her new ministry begins.

### **❖ The Vestry**

The vestry chooses the Search Committee, approves the Diocesan appointment of the Interim or other transition clergy and the Search Consultant, prepares the budget for the search process, and formulates the charge to the Search Committee. The vestry assists the parish in participating in the process and, when the process is complete, may elect the new rector subject to the parish's bylaws. The vestry also takes part in a Mutual Ministry Review one year after the new rector begins his/her ministry.

### **❖ The Office for Transition Ministry (OTM)**

The Canon for Transition Ministry is the Bishop's deputy in dealing with parishes during the time of transition. The Canon assists the vestry in appropriate closure of the out-going priest's ministry, assists the wardens and vestry in planning the interim process, assists the Bishop in appointing the Interim priest and the Search Consultant, coordinates with the Episcopal Church Office for Transition Ministry, screens and consults with the Bishop about prospective candidates, provides resources and training for interim priests and search consultants, provides resources and advice for the search committee, vestry and wardens, keeps the Bishop informed of the progress of all searches, assists in the final call and in the negotiation of a letter of agreement with the new rector, and finally, assists in the start-up of the new ministry.

### **❖ Search Consultant**

The search consultant works with the wardens, vestry and search committee throughout the time of transition. He or she assists the parish in evaluating their strengths and resources, in identifying goals, in dealing with conflict, and in negotiating the procedural aspects of the search. The search consultant works with the interim priest and with the Office for Transition Ministry and, with their assistance, identifies and responds to the needs and problems that may emerge as the process unfolds. He or she is the principal resource and point of intercommunication for the vestry, the interim, the search committee and the Office for Transition Ministry and the Bishop.

### ❖ **Search Committee**

The Search Committee fulfills the charge of the Vestry by conducting the search for a new rector. The responsibilities of the Search Committee include: determining the means of self-assessment and carrying out that assessment in order to write a parish profile, developing a system for screening, evaluating and notifying candidates as candidate materials are received, determining the various interview processes – written, telephone and face-to-face, communicating regularly with the OTM in order that the Office may conduct the various screening processes.

### ❖ **Interim Priest**

In the Diocese of Massachusetts the term “interim priest” is used for those trained and experienced in the ministry of transition. The terms and conditions under which an interim priest is employed may vary with local circumstances, but generally the responsibilities include the conduct of worship, the continuation of pastoral ministries, support of programs and whatever else contributes to normal parish program. The interim priest is specially trained to assist a parish to evaluate its mission and ministry, to make any needed changes in parish administration or program, and to help the parish prepare for the arrival of a new rector. This work is done in consultation with the wardens, vestry, search consultant and other parish leaders. The appointment of an interim occurs from within the Office for Transition Ministry and is approved by the Bishop since he or she is an extension of the Bishop’s ministry. **Under no circumstances can an interim be considered as a candidate for rector.**

### ❖ **Priest-in-Charge**

A Priest-in-Charge is appointed by the Bishop after consultation with the vestry and exercises the duties of Canon III.9.5 subject to the authority of the Bishop. A Priest-in-Charge generally is appointed for a one (1) to three (3) year time period during which the parish works on very specific, clearly articulated goals. At the end of this time he or she may be called to serve as Rector.

### ❖ **Deans**

The Diocese of Massachusetts is divided into geographical units known as Deaneries. The Deans should be informed of departing clergy and may take part, when possible, in their leave-taking. They should welcome new Interims and Priests-in-Charge and call on the new rector of a congregation as soon as possible. While they are not expected to do so, the deans may make themselves available to provide individual insight for clergy exploring call, including reviewing individual clergy portfolios, and to meet with final candidates if requested. Generally, unless the installation of a new rector coincides with an Episcopal visit, the Deans preside at the celebration of new ministry.

### ❖ **The Episcopal Church Office for Transition Ministry (OTM)**

The Episcopal Church Office for Transition Ministry is maintained by the Episcopal Church as a registry for all clergy whether or not they are actively seeking positions at this time. Computer files are maintained which show, among other things, the clergy person’s work experience, areas of special interest, expertise or training and developed skills. This data is presented in the form of a Clergy Portfolio. Portfolios for all clergy registered in the system are available through the Office for Transition Ministry. When a parish has identified its particular needs and preferences it may file through the Office for Transition Ministry, a search request that initiates a computer search for clergy matching most or many of the stated criteria. Information about the parish, in the form of a parish profile, is also filed with The Episcopal Church Office for Transition Ministry where it is made available to interested clergy. This Office publishes a monthly listing of all parishes seeking clergy.

## Sample Parish Search Checklist

- \_\_\_ Notification of Rector's departure;
  - \_\_\_ Date of announcement \_\_\_/ \_\_\_/ \_\_\_
  - \_\_\_ Expected date of departure \_\_\_/ \_\_\_/ \_\_\_
- \_\_\_ Wardens' visit to Office for Transition Ministry (OTM) \_\_\_/ \_\_\_/ \_\_\_
- \_\_\_ Visit to Vestry by Bishop and/or OTM \_\_\_/ \_\_\_/ \_\_\_
- \_\_\_ Search materials received (Search Guide, compensation guidelines)
- \_\_\_ Interim Priest identified and in place \_\_\_/ \_\_\_/ \_\_\_
- \_\_\_ Search Consultant identified \_\_\_/ \_\_\_/ \_\_\_
- \_\_\_ Search Committee formed and commissioned; Vestry's charge given
- \_\_\_ Transition Ministry Newsletter/Web listing ("Short Form") filed
- \_\_\_ Parish Profile completed, reviewed and copy sent to OTM
- \_\_\_ OTM parish profile form filed
- \_\_\_ Process of receiving names; applications acknowledged
- \_\_\_ Period of narrowing the field
- \_\_\_ (Long) List of ten - twelve finalists identified and sent to OTM for "red flag" checks
- \_\_\_ Candidates not selected are notified
- \_\_\_ Preliminary OTM check completed
- \_\_\_ (Short) List (3-4 names) submitted to OTM: Oxford Doc. and Bishop to Bishop conversations arranged
- \_\_\_ Bishop Office interviews candidates on short list
- \_\_\_ Final candidate(s) name(s) given by Search Committee to Vestry (parish) for approval
- \_\_\_ Bishop approves call of selected candidate
- \_\_\_ Call extended to \_\_\_\_\_ on \_\_\_/ \_\_\_/ \_\_\_
- \_\_\_ All other candidates informed of call
- \_\_\_ Letter of Agreement negotiated, signed, and sent to Office for Transition Ministry
- \_\_\_ Start date \_\_\_/ \_\_\_/ \_\_\_
- \_\_\_ Celebration of New Ministry \_\_\_/ \_\_\_/ \_\_\_



## On Leaving a Parish

Episcopal Diocese  
of Massachusetts



*These guidelines are intended to help clergy manage the termination of a ministerial relationship in a way that celebrates what has taken place and brings a sense of closure between priest and parish. Each situation, of course, is unique and presents its own challenges, but the principles underlying a good ending are constant. Saying a healthy, caring, and clear goodbye to a congregation helps effect a good beginning to the next chapter in one's vocational life as well as in the life of the congregation.*

## Steps for the departing priest to take ...

- Begin planning your departure early. Sufficient notice to the Bishop is considered to be 6–8 weeks when accepting another call, and 4 - 6 months, if retiring, so that there is sufficient time for everyone to process feelings, to put parish business in good order, and to prepare the wardens and vestry for their role in the transition. Timing of the announcement(s) is critical.
- Inform the bishop of your decision and then the wardens, in person. With the wardens, notify the vestry.
- With the wardens, send two letters to the congregation:
  - One from you, expressing gratitude for your mutual ministry and your intent to end the ministerial relationship with the parish. It is helpful to include information about what your future plans are.
  - One from the wardens, setting forth the vestry's plan for leave-taking and the parish's future, expressing affirmation and hope.
- Notify in writing the Bishop's Office (including the date of your last service), community personnel, and the Church Pension Fund (especially on retirement).
- Schedule and plan an exit interview with the Bishop's Office and one with the vestry and parish leaders.
- Plan for a liturgical ending with the parish in the context of worship (see *Book of Occasional Services*).
- Plan to say a formal goodbye to shut-ins, staff, and parish groups.
- Plan final visits with individuals with whom there may have been some tension or conflict.
- Issue an invitation to anyone who has "unfinished business" with you to come and talk.
- Plan ways of saying goodbye to those who have been particularly supportive.
- Change in a timely manner the mailing addresses on all periodicals and correspondence addressed to you.
- Make sure to clean out your office by the time of the official "last Sunday," but do so gradually.
- Clean out personal files, including computer files. You may wish to leave files that would be helpful to the interim.
- Let the congregation know - in writing - that, while you will remain friends, after your departure you will no longer do pastoral or priestly things with them (even in the interim period), such as leading a service or preaching at a wedding, baptism or funeral. You will come back for a parish event only at the new rector's invitation, and then in the capacity as the former rector.

- Prepare a thank-you and/or farewell piece for the parish newsletter.
- To facilitate the transition in pastoral care, summarize in writing any pertinent information about the sick, shut-ins or others needing pastoral care.
- Within the context of preaching the gospel, name your feelings and issues of closure in sermons. Do so in ways that allow you to share the experience of change and loss with the congregation, but don't lure the congregation into taking care of your feelings of sadness or ambivalence.
- If there is a gap between your departure and the arrival of the next clergy person to serve the parish during the transition, be sure the vestry has made arrangements through the Bishop's Office for emergency pastoral coverage. Be sure that lay leaders know about these arrangements.
- Have a party, in whatever style is most comfortable for you and the congregation!
- Turn in all keys!

## **Responsibilities of Transition Team**

The Transition Team, created by the Vestry at the time of the announcement of a rector's upcoming departure, particularly when there may be a longer than average period of time between announcement and departure, serves primarily to oversee the over-all health of the clergy and parish in the interest of a life-giving and positive transition time. The Transition Team should be made up of about 6 – 8 members and meet as needed with greater time and attention focused during the time of leave-taking and again for the welcoming of the new Rector. The expectation is that they themselves may not do all of these tasks, but will find people to take on various responsibilities.

Their specific tasks might include:

- Provide support for whatever Clergy may be present. This means the departing Rector, the interim, the new Rector and their families.
- Coordinate celebrations and thanksgivings for the ministry of the departing Rector including the final service.
- Prepare ways of welcoming and orienting the new rector and his/her family to both the parish and the community, including social events, small gatherings in peoples' homes, showing the new rector where the stores, schools and medical services may be found etc.
- Undertake other transition-related tasks from time to time as may seem appropriate.

## THE INTERIM PRIEST IN THE DIOCESE OF MASSACHUSETTS

**The Interim Priest** is a priest trained to assist parishes during a time of transition, especially during the period between the leave-taking of one rector and the calling of another rector. It is an intentional ministry of sustaining the direction and ministry of a congregation as defined by the Vestry; reviewing the past, assessing the present, and evaluating the future. However, it is expected that the ministry during the interim period will be different from that experienced by members of the parish under the previous rector.

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

- Help the congregation deal with a sense of loss and any unresolved issues arising from the rector's departure.
- Deal with internal conflicts and help heal any divisions within the congregation.
- Help the Vestry, lay leaders and staff make such changes as may be needed to align parish life and administration with generally accepted standards in the Diocese.

### Selection of the Interim Priest

- The Bishop through the OTM will choose an appointment from among qualified local candidates or recruit qualified "external" candidates for the position.
- The Bishop will recommend one candidate to the wardens and vestry.
- The candidate meets first with the wardens and with the vestry. Note: Normally, this should take the form of an informal parish or vestry conversation (greet/meet) and/or a visit by a small group to observe the clergy at the parish being served by him/her. **The candidate is not to be subjected to a prolonged "approval" process by the parish.**
- If the vestry and the candidate agree, a Letter of Agreement setting forth the mutual obligations and responsibilities of the Interim and the vestry is negotiated. A standard Interim Priest Letter of Agreement may be found as part of the diocesan clergy compensation guidelines available on-line. The appointment is official upon the approval of the Letter of Agreement 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.

**Note: Recognizing that the interim time is a period of intentional transition and change and that a priest specifically trained in interim ministry is the best person to accompany a parish through this transition, it is not customary or desirable that a current Assistant or Associate become the Interim.**

## **Developmental Tasks of the Interim Period**

The interim period is seen as a prime time for renewal, re-energizing the parish in its life and mission. Beyond maintaining effective ministry during this period, the Vestry and Interim Priest are expected to work together to prepare for a healthy transition to the next Rectorship.

Recognizing that the review of a congregation's total ministry should be a continuing process, the Interim Priest, Wardens and Vestry are expected to meet monthly to clarify expectations and to evaluate successes and raise concerns from the congregation, staff, leadership, or the Interim Priest in order to ensure the effectiveness of their joint ministry.

Specific tasks that may be addressed include:

- 1) Coming to terms with the history of the congregation and its relationships with previous clergy.
- 2) Discovering the congregation's special identity, what it dreams of being and doing apart from previous clergy leadership.
- 3) Dealing with shifts in leadership roles that naturally evolve in times of transition, allowing new leaders to come to the fore constructively.
- 4) Renewing and reworking relationships with the Diocese, so that each may be a more effective resource and support to the other.
- 5) Building commitment to the leadership of the new rector in order to be prepared to move into the future with openness to new possibilities.

## **Vestry Responsibilities**

- All ministries other than those reserved to ordained leadership (such as administering the sacraments) are understood as mutual ministries of the laity of the parish and the Interim Priest.
- The Vestry shall lead the laity to support and cooperate with the Interim Priest in pursuit of parish goals and in the performance of the developmental tasks of the interim period.
- The Vestry is the legal agent for the parish in all matters concerning its corporate property and in its relationship with the Interim Priest. The Vestry will see to it that the Interim Priest is properly supported, personally and organizationally, as well as in the Vestry's financial obligations to the Interim Priest.

## **Interim Priest's Responsibilities**

- The Interim Priest represents and extends the ministry which is the Bishop's pastoral and canonical responsibility for congregations in leadership transition.
- The Interim Priest shall lead the parish as pastor, priest and teacher, sharing in the councils of this congregation and of the whole church, in communion with our Bishop

- The Interim Priest shall work with the Vestry and other lay leaders to maintain the regular schedule of worship services and preaching, education, pastoral care and pastoral offices (weddings, funerals, baptisms), calling upon the sick and shut-in, visiting newcomers, and ongoing administration of the parish
- The Interim Priest shall supervise all parish staff in the exercise of their responsibilities and ministries, for which they shall be accountable to the Interim Priest.
- The Interim Priest supports the Vestry in its responsibilities, including the hiring, evaluation and termination of staff.

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

Monthly reports by the Interim Priest to the Office for Transition Ministry, and attendance at monthly meetings of the Interims' group are expected by the Bishop.

**THE PRIEST-IN-CHARGE PROGRAM OF  
THE DIOCESE OF MASSACHUSETTS**

A Priest-in-Charge (PIC) appointment occurs when a parish's wardens/vestry in conversation with the Bishop believes its congregation would be better served by a Priest-in-Charge appointment.

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

- The parish is in a healthy place but has concerns about losing momentum.
- A period of instability or conflict has preceded or followed the departure of the clergy person
- A joint collaborative ministry (e.g. cluster, merger, etc.) appears worth exploring with other parishes;
- The necessary financial support for hiring new clergy is lacking and needs to be addressed;
- The parish would benefit from a period of stable and consistent ministry before it turns its attention to a search.

If there is agreement on the benefit of a PIC appointment, it is often helpful for the vestry to prepare a brief profile describing the parish, what it seeks in a PIC, and what it will offer to the PIC (e.g., total compensation, administrative support).

Selection of the PIC

- The Bishop will choose an appointment from among qualified local candidates or recruit qualified "external" candidates for the position.\*
- The Bishop will recommend a candidate to the wardens and vestry. Occasionally after consultation with the Bishop and/or Canon for Transition Ministry, 2 or 3 candidates may be presented for consideration.
- The candidate(s) meets with the vestry. Note: Normally, this should take the form of an informal parish or vestry conversation (greet/meet) and/or a visit by a small group to observe the clergy at the parish being served by him/her. **The candidate(s) is/are not to be subjected to a prolonged "approval" process by the parish.**

---

\* Recognizing that the transition time is a period of intentional transition and change and that a priest specifically trained in Transition Ministry is the best person to accompany a parish through this transition, it is not customary or desirable that a current assistant or associate rector be appointed as priest-in-charge.

If the vestry and one of the candidate(s) recommended agree, a Letter of Agreement setting forth the mutual obligations and responsibilities of the PIC and the vestry is negotiated. A standard PIC Letter of Agreement may be found as part of the diocesan clergy compensation guidelines available on-line. The appointment is official upon the approval of the Letter of Agreement by the Bishop.

- If one candidate is presented at a time and the proposed appointment of the PIC 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.

### Term of Appointment and Authority of PIC

- A PIC appointment is usually for a period of from one (1) to three (3) years, subject to modification only with the approval of the Bishop.
- With the approval of the Bishop, a PIC may become a candidate for rector following a period of mutual discernment including a mutual ministry review undertaken after two full years.
- It is expected that within six months of the appointment, the vestry and PIC will jointly establish mutually responsible short-term and long-term expectations/goals for the mission and ministry of the parish.
- A time for mutual ministry review by vestry and clergy must be set forth in the Letter of Agreement.
- 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 subject to the authority of the Bishop. See attached excerpt from the Canons.
- The PIC is **required** to attend monthly PIC meetings through Fresh Start.

Priest in Charge Consultant: The OTM will also assign a Priest-in-Charge consultant to work with each parish served by a PIC. The consultant is available as a resource to the priest and the Vestry/Wardens through the first 2 years and then able to walk through the third year of discernment. All PIC consultants are trained as coaches, search consultants and/or business consultants, and thus understand the dynamics of congregational development and transition. There is no charge to the parish for the service of the PIC consultant.

### Stages During the PIC Period

Although each congregational situation is different, there are recognizable stages throughout the tenure of the PIC:

- Introductory Stage (Lasts 9-12 months): Getting to know each other; building relationships; becoming familiar with the rhythm of life together; identifying conflicts/challenges.

- Romance Stage (Lasts 9-12 months): Trust is built; develop confidence in working together, begin to do some future planning.
  - Common characteristics: People may really like the clergy (and vice versa). Often a feeling that “We’ve done all we need to do”. Be wary of making commitments too soon.
  
- Discernment Stage (Often the beginning of Year 3: lasts 6-9 months): - Vestry/parish and clergy are visioning/discerning in relation to one another.
  - Common characteristics: Vestry (or designated committee) undertakes a period of intentional self-study:
    - Where are we?
    - What is our mission/ministry?
    - What kind of clergy leadership do we need/want?
  - Post Discernment: Is this PIC the right person to continue as Rector? (Clergy should also be doing own discernment about call to parish)
    - Options:**
      - Request that PIC be called as rector → New Letter of Agreement is created and date set with Bishop’s Office for Celebration of New Ministry.
      - PIC is not called but becomes Interim during clergy search.
      - PIC completes term of agreement and an Interim is appointed during clergy search period.
  
- Closure Stage (Final 6-9 months): If PIC is appointed rector; focus becomes setting short/long-term goals and strategies. If PIC is not appointed rector, formal search process begins under the PIC or a new clergy Interim.

## **Canons of the Episcopal Church: Priests in Charge**

### **Canon III.9.3(b)**

#### **CANON 9: Of the Life and Work of Priests**

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

### **Canon III.9.5**

#### ***Of Priests and Their Duties***

Sec. 5.

**(a)**

- (1) The Rector or Priest-in-Charge shall have full authority and responsibility for the conduct of the worship and the spiritual jurisdiction of the Parish, subject to the Rubrics of the Book of Common Prayer, the Constitution and Canons of this Church, and the pastoral direction of the Bishop.
- (2) For the purposes of the office and for the full and free discharge of all functions and duties pertaining thereto, the Rector or Priest-in-Charge shall at all times be entitled to the use and control of the Church and Parish buildings together with all appurtenances and furniture, and to access to all records and registers maintained by or on behalf of the congregation.

**(b)**

- (1) It shall be the duty of the Rector or Priest-in-Charge to ensure all persons in their charge receive Instruction in the Holy Scriptures; in the subjects contained in An Outline of the Faith, commonly called the catechism; in the doctrine, discipline, and worship of this Church; and in the exercise of their ministry as baptized persons.
- (2) It shall be the duty of Rector or Priest-in-Charge to ensure that all persons in their charge are instructed concerning Christian stewardship, including: (i) reverence for the creation and the right use of God's gifts; (ii) generous and consistent offering of time, talent, and treasure for the mission and ministry of the Church at home and abroad; (iii) the biblical standard of the tithe for financial stewardship; and (iv) the responsibility of all persons to make a will as prescribed in the Book of Common Prayer.
- (3) It shall be the duty of Rector or Priest-in-Charge to ensure that persons be prepared for Baptism. Before baptizing infants or children, Rector or Priest-in-Charge shall ensure that sponsors be prepared by instructing both the parents and the Godparents concerning the significance of Holy Baptism, the responsibilities of parents and Godparents for the Christian training of the baptized child, and how these obligations may properly be discharged.
- (4) It shall be the duty of Rector or Priest-in-Charge to encourage and ensure the preparation of persons for Confirmation, Reception, and the Reaffirmation of Baptismal Vows, and to be ready to present them to the Bishop with a list of their names.
- (5) On notice being received of the Bishop's intention to visit any congregation, the Rector or Priest-in-Charge shall announce the fact to the congregation. At every visitation it shall be the duty of the Rector or Priest-in-Charge and the Wardens, Vestry or other officers, to exhibit to the Bishop the Parish Register and to give information as to the state of the congregation, spiritual and temporal, in such categories as the Bishop shall have previously requested in writing.
- (6) The Alms and Contributions, not otherwise specifically designated, at the Administration of the Holy Communion on one Sunday in each calendar month, and other offerings for the poor, shall be deposited with the Rector or Priest-in-Charge or with such Church officer as the Rector or Priest-in-Charge shall appoint to be applied to such pious and charitable uses as the Rector shall determine. When a Parish is without a Rector or Priest-in-Charge, the Vestry shall designate a member of the Parish to fulfill this function.
- (7) Whenever the House of Bishops shall publish a Pastoral Letter, it shall be the duty of the Rector or Priest-in-Charge to read it to the congregation on some occasion of public worship on a Lord's Day, or to cause copies of the same to be distributed to the members of the congregation, not later than thirty days after receipt.
- (8) Whenever the House of Bishops shall adopt a Position Paper, and require communication of the content of the Paper to the membership of the Church, the Rector or Priest-in-Charge shall so communicate the Paper in the manner set forth in the preceding section of this canon.

**(c)**

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

## Liturgy for the Ending of a Pastoral Relationship

*Departing Minister:*

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

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

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

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

*Dean:*

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

*Departing Minister:*

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

*People:* Amen

*Departing Minister:*

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

*People:* Amen

*Departing Minister:*

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

*People:* Amen

*Departing Minister:*

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

*People:* Amen

*Dean:*

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

*People:* We do.

*Departing Minister and Congregation:*

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

Silence

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

Silence

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

Silence

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

Silence

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

Silence

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

**Sample Budget for Search Process**

Search Consultant (Retained for a fee of \$750-\$850 or \$50/session & travel @ IRS mileage reimbursement \$0.555 per mile [2012])	\$ 800 – \$1,500
Telephone and Fax costs	\$ 200
Oxford Document Background checks (\$160 per person	\$ 480
Visits to Candidates	\$ 500 - \$?*
Final Candidates' Visits to Parish	\$ 200 - 500*
Moving Expenses of New Rector	\$3,000 –\$12,000 *
Celebration of New Ministry	\$ 300?

---

\* These figures are estimates only and vary greatly depending on how wide the search is extended geographically in the final stages. A total search budget might range from \$2,000 to \$20,000.

## **Search Committee Job Description**

### Formation of the Search Committee

The Search Committee is a creation of the Vestry and works for and on behalf of the Vestry. The Committee may be formed shortly before or after the previous clergy leaves the parish. The senior warden, with the advice and consent of the entire Vestry, appoints members to the Search Committee. It is important to keep in mind that in accordance with the canons of the church, only the Vestry can issue a call and then only with the approval of the Bishop.

### Composition of the Search Committee

The Search Committee should be as broadly representative of the parish as possible in a manner carefully selected by the Vestry. It should be made clear to the congregation that, though volunteers for the Committee are given careful consideration, because balance of the Committee is so crucial to the search process, volunteers may or may not be appointed. **It is not appropriate for staff or other clergy to serve on the Search Committee.**

The chair of the Search Committee may be designated by the Vestry or elected by the Committee itself. As a rule, the warden should not serve on the Search Committee since all their energies should be devoted to keeping the church going during the interim period. They may attend meetings as ex officio members without vote if they so choose. A Search Committee is normally somewhere between 8-12 persons. At least one Vestry member (often two) whose term will extend through the transition time should be appointed to serve on the Search Committee in order to act as liaison and information link between the two bodies.

### Desired Characteristics of Search Committee Members

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

- Good organizational skills (Essential for the Chair of the Committee)
- Team player
- Person of prayer
- Member 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

**Note:** The conduct of a search for new clergy differs in many ways from the traditional executive corporate search. Therefore, it is not desirable for the Search Committee to adopt a corporate search model during its discernment and deliberations. By the same token, vestries should resist the temptation to stack the Committee with persons having human resources or executive search backgrounds.

### Search Process Timeline

Self-Study	2	–	3 months
Receiving Names	2	–	4 months
Reading Applications Narrowing the Field Choosing Long List	2	–	3 months
Phone Interviews Deployment check Choosing Short List	1 ½	–	3 months
Interviews and Final Selection	1 ½	–	2 months
Time between call and arrival of new Rector	2	–	3 months
<b>Total Time</b>	<b>11</b>	<b>–</b>	<b>18 months</b>

Each parish moves at its own pace and according to its own process of discernment; this timetable is suggested only as an aid in gauging progress and holding to a certain schedule.

## **Search Options**

- a. **The traditional search** (as outlined in this document)
- b. **An abbreviated search with short list:** After the parish completes its self-study, the Bishop, through the OTM, names three or four candidates for the search committee to consider, thus eliminating the steps of sorting through the papers of many prospective candidates. It is in fact the task of the OTM in this instance to carry out the extensive groundwork of narrowing the field, and that process, done carefully and sensitively, takes time. Upon reception of the short list (containing 3–10 names, depending on an agreement with the vestry), the committee conducts its work as it would normally, in reviewing and—as required with a short list—interviewing the candidates. If a rector is not called as a result of the discernment process, the congregation may ask for more names or choose one of the other search options.
- c. **Appointment of the rector by the Bishop** (following a period of self-study)
- d. **Appointment of a Priest-in-Charge**, allowing a period of non-search to occur in parish life which usually lasts one to three years.

## **Sample Charge from the Vestry to the Search Committee**

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

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

- Secure the services of clergy during the interim time
- Engage a Search Consultant as recommended by the Office for Transition Ministry to assist in the search process
- Appoint and charge a Search Committee
- Provide both a scope and a budget for the search
- Maintain the congregation while the search is being conducted
- Develop a salary and housing package for the new rector
- Ultimately call a new rector
- Negotiate the package and Letter of Agreement with the new rector

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

- Elect Search Committee leadership, including a Chair and Vice-Chair (or Co-chairs), Recording Secretary, Corresponding Secretary and a Chaplain
- Work with the Diocesan Search Consultant contracted by the Vestry
- Determine and employ appropriate group dynamics exercises in order to build a sense of community and common purpose, strengthen knowledge of each other and develop strong communication levels
- Establish, and revise periodically as necessary, a projected timetable for fulfillment of the Search Committee's responsibilities
- Determine the format for and conduct a self-study of the congregation
- Develop a parish profile which briefly describes the parish – its passions, hope and dream for the future and gifts for ministry desired in a new rector.
- Complete the Office for Transition Ministry (OTM) form and the Transition Ministry Newsletter form
- Develop and implement a process for screening candidates including written questions, reference checks, telephone interviews, visits and interviews with final candidates
- Develop a uniform system of rating and ranking candidates
- Communicate the progress of the Search Committee regularly to the parish through announcements, bulletins and newsletter articles
- Communicate with candidates promptly their status in the process
- Recommend one (1) final candidate to the Vestry for election and call\*

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

## **Sample Liturgy for Commissioning Search Committee**

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

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

*The Celebrant says the following words:*

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

*The Celebrant asks the warden:*

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

*Warden:* I believe they are.

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

*Candidates:* I will.

*Celebrant:* Let us pray.

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

In the Name of God and of this congregation I commission you as members of the Search Committee of \_\_\_\_\_ Church.

## Parish Profile Outline

Every parish story is different and hence every profile will reflect those differences and have its unique style. Some churches find carrying a theme throughout helps them to focus their story, but this is not necessary. In the interest of good stewardship, the Office for Transition Ministry is now recommending a brief – 1 – 2 page -- profile in lieu of the traditional multi-page booklet. Additional back up materials may be placed on the parish website. The essential parts of any profile should include:

- Introduction: **Who we are**, including a brief history of the parish.
- **Where we are located**: A brief geographical and demographic overview of the community in which the church is located.
- **Our Mission & 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 web site.
- A statement about the **Diocesan Mission Strategy**, which is provided by The Office for Transition Ministry.
- A statement of financial information about the parish.
- Finally a statement about the kind of person the parish is searching for to be a companion with them in their journey toward fulfilling their mission and vision, including leadership style, clergy gifts for ministry sought by the parish and other expectations and challenges for the new rector.

A more expanded profile of the parish may be posted on the parish's website if desired.

## **Interviews, Interviewing and Various Sample Questions**

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

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

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

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

### **Sample Written Questions (Use no more than 4 – 5)**

- In the past 5 years of your ministry, what is the accomplishment of which you are most proud?
- What drew you to the ministry?
- What do you see as your role in church growth and stewardship?
- What leads you to consider a new position at this time?
- How do you continue to peel back the layers of discovery and Christian growth in the midst of your work right now?
- How do you bring your own brokenness into your ministry?
- Include at least one question based on past performance relevant to the needs of the particular parish i.e. Please tell us about a time when.....

## Sample Questions for Phone Interviews

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

## Sample Questions for Finalists

- (This is the most important question of all and should be asked of all final candidates!) 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?
- Tell us about a time when things weren't going well
- In the past 3 years has your parish reached its stewardship goals, and if not, why not? What is your theology of stewardship and how do you see your role?
- What would you like to tell us about yourself that will help us know you better? / What can we tell you about us?
- One of the particular areas for growth at \_\_\_\_\_ is \_\_\_\_\_. Tell us how you have addressed this in other parishes in which you have served.
- Having come this far on your journey with us, what excites you about coming here? What do you think you could bring us?
- MA is somewhat unusual in that we have many ordained gay and lesbian priests. How would you reply to a parishioner questioning the election of a gay bishop?
- It has been said there are two distinct styles of ministry leadership: ministry developer and ministry deliverer. Which would you say is your style of leadership and what evidence can you offer to support this?

## **Grounds Rules for Finalists' Visits to Parish**

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

## Rector's and Congregation's Mutual Covenant of Ministry

### EPISCOPAL DIOCESE OF MASSACHUSETTS

#### LETTER OF AGREEMENT

between

The Rev. \_\_\_\_\_ and The Vestry of \_\_\_\_\_ Church, \_\_\_\_\_, Massachusetts, which has elected [him/her] to be Rector with the understanding that [his/her] rectorship shall continue until dissolved by mutual consent or by arbitration and decision as provided by Title III, Canon 9.13 of the Episcopal Church.

The relationship between a Rector and a Vestry is unique, and it evolves within a larger covenant of mutual trust and ministry to each other. The purpose of this Letter of Agreement is to strengthen that relationship by clarifying some of the practical arrangements and to reduce later misunderstandings.<sup>1</sup>

#### Section A – COMPENSATION

1. The Rector's salary will be \$ \_\_\_\_\_ per annum commencing on or about \_\_\_\_\_.

The parties agree that the Rector's Total Clergy Compensation ("TCC" – salary, plus housing; SECA, housing value of the rectory if applicable) will equal \$ \_\_\_\_\_, including the amount of the Housing Allowance, if applicable, and \_\_\_\_\_.<sup>2</sup>

2. Housing<sup>3</sup>

[Option A - Rector will not live in a Rectory]

The Vestry agrees to adopt annually the necessary resolution required by the Internal Revenue Service designating that portion of the TCC shown above as a Housing Allowance within the meaning of Section 1.107 of the IRS Code.<sup>4</sup>

---

<sup>1</sup>This Letter of Agreement is intended to be negotiated after the Vestry has extended the initial call to the Rector and it should be reviewed annually. The model contains recommended provisions that may be varied according to the particular facts and circumstances. For a part-time Rector, the various sections should be prorated on the basis of a fraction (or percentage), e.g., half-time, three quarters time, etc. Consult the current Diocesan Guidelines for Salaries and Benefits.

<sup>2</sup>Specify other compensation received by the Rector that may be considered part of TCC. Consult the current Diocesan Guidelines for Compensation and Benefits.

<sup>3</sup>The model contains two options relative to housing. "Option A" applies to those situations where the Rector will not live in a Rectory. "Option B" applies to those situations where the Rector will live in a church-provided Rectory.

<sup>4</sup>The amount of the TCC designated as a Housing Allowance should be the lesser of (1) the fair rental value for the housing; including furnishings and appurtenances (such as garage) and utilities or (2) the amount the Rector expects to spend on housing.

[Option B - Rector will be living in a Rectory]

The Rector and [his /her] family will live in the church-owned Rectory. The Vestry will be Responsible for the following expenses:

- (a) Insurance (and property taxes, if any) on the property;
- (b) Maintenance or replacement of the following appliances:  
[Specify, such as refrigerator, dishwasher, etc.];
- (c) Maintenance of the structure(s), renovations or capital improvements;
- (d) [Specify utilities, such as heat, light, water, etc.];
- (e) [Specify other responsibilities].

The Rector and [his/her] family are responsible for good stewardship in regard to the care of the Rectory and will remain responsible for the general care and upkeep such as [specify particular Responsibilities].<sup>5</sup>

The Rector is expected to present an annual report to the Vestry on the condition of the Rectory, With particular attention to items requiring maintenance.

3. [Optional] Other Compensation: [Specify, e.g., SECA allowance, equity allowance, etc.].<sup>6</sup>

**Section B – PREMIUMS**

1. The Vestry will pay the following premiums as required by the Diocese:
  - (a) Church Pension Fund premiums based on the Rector’s TCC;
  - (b) The cost of Health Insurance premiums [specify whether individual or family coverage, which includes domestic partners, where applicable] according to the percentage prescribed by Diocesan Policy.
2. The Vestry will provide the following additional benefits [specify other benefits, e.g., dental, other insurance, life insurance for clergy not eligible for pension, etc. and allocation of premiums].
3. In the event of a total and permanent disability of the Rector, or in the case of the death of the Rector, the following agreements apply:
  - (a) Regarding housing: \_\_\_\_\_month(s) in Rectory or \_\_\_\_\_month(s) Housing Allowance, to be negotiated by the Vestry, Warden and the Rector, or Rector’s spouse or other designee.
  - (b) Regarding compensation; \_\_\_\_\_month(s) salary per year of service, up to a maximum of \_\_\_\_\_month(s).

---

<sup>5</sup>The specific responsibilities of the Vestry and Rector will depend on the particular facts and circumstances. Once these are determined, they should be delineated with as much specificity as possible.

<sup>6</sup> Since a Rector while living in a church-provided Rectory will not build any equity in a home, a number of Vestries have agreed to fund an equity allowance through contributions to a tax sheltered 403(b) plan. Such other compensation is includable as TCC.

## Section C – EXPENSES

The Vestry agrees to pay for the following expenses incurred by the Rector in fulfilling [his/her] professional duties:

1. Moving: The cost of moving the Rector's family and household goods when the initial call has been accepted.
2. Travel: The Vestry agrees to provide the Rector with \_\_\_\_\_<sup>7</sup>  
  
[Option A: reimbursement for all church-related automobile travel at the current rate established by the IRS (2012=\$.555/mile)]  
  
[Option B: a travel allowance of \$\_\_\_\_\_per year adjusted annually for all church-related automobile travel.]  
  
[Option C: an automobile for purposes of church-related travel upon such terms as the Vestry and the Rector shall determine.]
3. Communications: To provide for a telephone in the Rector's office and study. All postage for church business will be included in the parish budget.
4. Office: All necessary office furniture, equipment and supplies will be paid by the parish, the amount to be established in the annual budget.
5. Discretionary Fund: A fund will be provided for charities and expenditures at the discretion of the Rector in accordance with the Diocesan Guidelines for Clergy Discretionary Funds, the amount to be established in the annual budget.
6. Guests and Hospitality: The Rector will be reimbursed for the reasonable costs of hospitality and entertainment on behalf of the parish, the amount to be established in the annual budget.
7. Professional Fees: Dues of the Rector to the Massachusetts Episcopal Clergy Association and other professional associations, the cost of the annual Clergy Conference with the Bishop, and the cost of professional periodicals, the amount to be established in the annual budget.
8. Continuing Education: The amount of \$\_\_\_\_\_ annually to support the Rector's continuing education. The Rector is expected to make an annual report to the Vestry and/or parish on his continuing education work.
9. The cost of pulpit supply and pastoral services: when the Rector is absent from the parish; the amount to be established in the annual budget.

---

<sup>7</sup> Specify whether the Rector will receive (1) travel reimbursement and, if so, the rate of reimbursement, (2) an annual allowance or (3) an automobile.

## **Section D - LEAVE TIME**<sup>8</sup>

The Vestry agrees that the Rector shall have the following periods of leave at full pay:

1. \_\_\_\_\_ month(s) of vacation per year, including Sundays, plus[ \_\_\_\_\_].<sup>9</sup>
2. \_\_\_\_\_ weeks per year (in addition to vacation time) for continuing education and career development.
3. **Paid Sabbatical Leave:** The Priest is eligible for 3 months of sabbatical leave for every 5 years of parish ministry, for the purpose of renewal, study, travel, and continued spiritual growth.[*Congregations may wish to adapt this time frame to fit their needs, or the needs of their clergy. For example, a Priest may wish to have a longer leave after a longer number of years of service, or may wish to have shorter leaves after fewer years.*] Applications for diocesan support from the bishop's Clergy Sabbatical Program can be obtained from the Department of Canonical Ministries.

Planning for the Priest's sabbatical shall begin at least nine months prior to the first day of the leave. The Priest and Vestry shall agree to the form this planning shall take. Both the Priest and Vestry will participate in this planning, which shall include financial and activity information about the sabbatical, provision for congregational life and continuity, and clergy support during the Priest's absence.

4. The Rector is expected and encouraged to participate in Regional, Diocesan and National Church responsibilities as well as community endeavors. Further, time given to such work shall be understood as an integral part of the Rector's ministry in the parish.<sup>10</sup>
5. [Specify other leaves.]

## **Section E - SUPPLEMENTARY COMPENSATION**

The disposition of wedding, funeral and other fees will be determined in conjunction with the Vestry.

The following understanding has been reached between the Rector and the Vestry concerning the income the Rector may receive performing [specify].

## **Section F - USE OF BUILDINGS**

In addition to his/her use and administration of parish buildings for the discharge of his/her duties, the Rector shall have the right to grant use of the buildings to individuals or groups from outside the parish under general conditions to be determined in conjunction with the Vestry.

---

<sup>8</sup> Currently, one month of vacation per year and one week of continuing education/career development per year are the recommended minimum. Additional time off for clergy retreat is strongly encouraged

<sup>9</sup> Specify additional leave, e.g., amount of time after Christmas, amount of time after Easter and amount of other time as agreed upon with the Wardens.

<sup>10</sup> Other such leave may include parental leave in the event of childbirth or adoption. Consult current Diocesan Guidelines on Compensation and Benefits

**Section G - REGULAR PARISH GOAL SETTING**

The Rector and Vestry will review the mutual ministry of the parish, vestry, and clergy on or about \_\_\_\_\_(in no event more than one (1) year) from the Rector’s assumption of his/her duties on the basis of goals and expectations set at the time of the call of the new Rector. Subsequently, periodic reviews (every year or two years) will be scheduled. These reviews for the purpose of goal-setting will cover the following items:

1. What are the missions and goals of the parish as presently understood?
2. What are the roles and tasks of the parish leaders (Rector, Vestry members, and others) in accomplishing the goals?
3. How well have the previously set goals been met?
4. What goals and expectations will be set for the next period in the life of the parish?

Finally, this Letter of Agreement will be revised as desired with the mutual consent of Rector and Vestry, and at any rate shall reviewed and revised no later than \_\_\_\_\_.

**Section H – STATEMENT OF NON-DISCRIMINATION**

In accordance with diocesan and national church principles, this congregation will not discriminate on grounds of age, race, gender, sexual orientation, marital status, or disability. <sup>11</sup>

---

<sup>11</sup> Since the 2001 Report to Convention, the Compensation and Benefits Committee has included this option to reflect the concerns of both the Diocese and National Church as indicated in a variety of resolutions presented in their respective conventions.

**PARISH SIGNATURES**

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

Approved by the Vestry on (date): \_\_\_\_\_

Warden: \_\_\_\_\_

Warden \_\_\_\_\_

Clerk \_\_\_\_\_

**BISHOP’S SIGNATURE**

Reviewed by the Bishop:

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

Bishop: \_\_\_\_\_

## **Farewell Liturgy for Interim Ministry**

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

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

*The Jr. Warden continues,*

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

*The Sr. Warden asks the congregation,*

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

*People: We do*

*Priest:*

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

*People:*

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

The Departing Interim gives the final blessing

## **To Welcome the New Rector**

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

## NOTES