

# OPEN DOORS NEW FUTURES CLERGY SEARCH

CONSULTANT HANDBOOK



What does God want to do here?

# SIGNS OF THE HOLY SPIRIT

Spiritual discernment is a prayerful, informed, and intentional effort to distinguish God's voice from others that influence us, that the Kingdom might come and God's will be done on earth as it is in heaven. The goal of spiritual discernment is to receive God's guidance.

PEACE	The pre-eminent sign: a sense of confidence at a very deep level indicates we are moving in the right direction. As a group considers an issue, the members will feel permeated with this peace as they approach God's perspective on the matter before them. God's peace does not preclude struggle. Pretending to agree can create an illusion of harmony and peace. Such apparent consonance is weak, superficial and will not last. Turbulence and turmoil are likely in early stages of discernment. The peace of God is born of bold searching, honest expression, mutual respect and genuine compassion. Ultimately the power of God's truth and love brings serenity and a sense of well-being.
CONVERGENCE	Various things that occurred independently and at different times, that heretofore had not seemed inter-related, all of a sudden converge and fit together, informing one another. A pattern emerges like pieces of a mosaic coming together.
PERSISTENCE	The same message keeps coming through unrelated channels and in different ways.
FRUITFULNESS	When certain endeavors produce abundant fruit, God may be calling us to cultivate those areas further.
DISORIENTATION <i>(followed by a sense of clarity)</i>	This occurs when a previous comprehension of truth gets shaken up and a higher truth falls into place with a sudden sense of unanticipated clarity. Suddenly, something significant becomes clear in a vivid way.
JOY	Radiance swells up from within those who are engaged and the Holy Spirit extends a sense of elation.
ENERGY	If we are getting the message right, we are infused with the energy to act on it.

*The Holy Spirit, whom God will send in my name, will teach you everything.*  
*John 14:26*

Farnham, Suzanne G., Stephen A. Hull, R. Taylor McLean. *Grounded in God: Listening Hearts Discernment for Group Deliberations*, Revised Edition. Morehouse Publishing. 1996.



# GUIDANCE PRAYER FOR NEW MINISTRY

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

Book of Common Prayer, page 818

## INTRODUCTION

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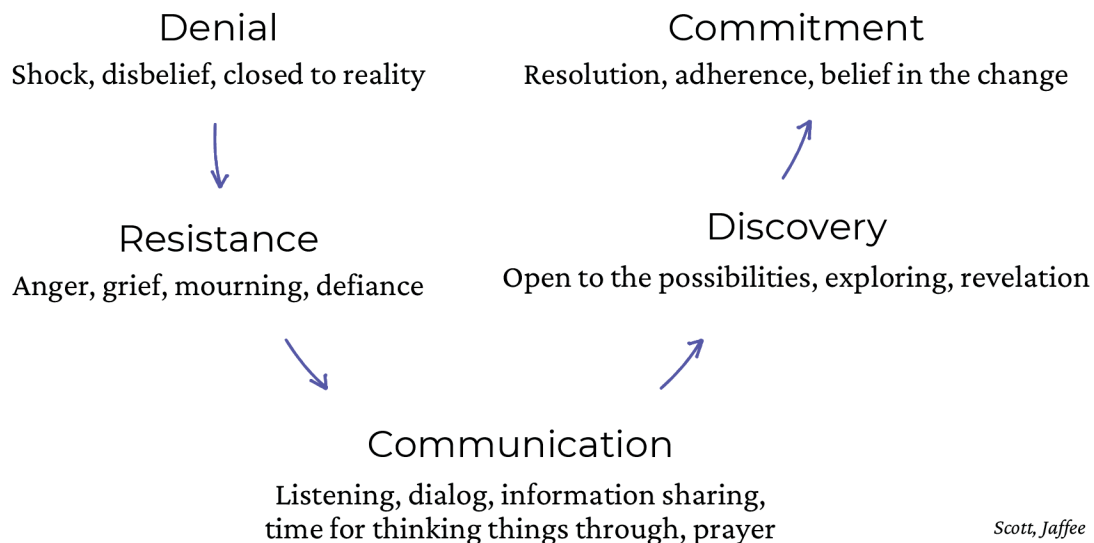
*May your kingdom come. May your will be done, on earth as it is in heaven.*

*Matthew 6:10*

This Handbook contains details for the Consultant's role as facilitator for the Clergy Search of the Open Doors New Futures process. It is meant to be used in conjunction with the Interim Clergy Handbook and the Clergy Search Vestry Handbook. The Interim Clergy Handbook contains details for goals and objectives for congregational development during the Interim period. The Clergy Search Vestry Handbook contains details of the entire Clergy Search process and the coordination that happens between the Vestry, the Transition Ministry Team, and the Consultant. Please familiarize yourself with all of the handbooks.

# INTRODUCTION (CONTINUED)

## Phases of Change



Change is met with a variety of responses. The Clergy Search has a mixture of feelings, everything from hope to grief. Not everyone will welcome the work of change or have the initial patience for transformative work. It is important to remember the flowchart for Congregational Change dynamics (Phases of Change): Denial, Resistance, Communication, Discovery, and Commitment. Denial and resistance are expressions of fear and loss. People don't know where they will be on the other side of change. Will there be a place for them in the new future, and will they recognize "their church?" Giving people a place both to voice fears and talk through what God might want done occurs in the communication phase which provides places for dialogue, learning, prayer, and exploration, the process in which people find their place in the future and become engaged and creative.

The Parish Summit in the Clergy Search, and the data gathering events of the Mission Search provide the opportunities for people to talk through change with their new clergy partner. Everyone will have a chance to speak and hear. The Open Doors New Futures combined Clergy and Mission Search has a variety of places to be heard, learn, explore and discern God's leading. The data gathering and discussion gives God the raw experience of the people to speak into and through. The surrounding scaffolding of scripture and prayer provide places for people to listen for and hear God speaking. At its best, Open Doors New Futures provides an experience of God's inspiration and revelation, love and provision, for the congregation right now in their own lives and community.

The leadership's responsibility in change is to communicate clearly. They must identify the catalyst and context of change and facilitate conversations, that lead to discovery, conversion, and commitment to the future. Leaders assure accountability of the leadership to meet goals, and facilitate congregational participation. Neighborhood exploration identifies the places with opportunities to engage God in the neighborhood, and the call to ministry emerges. This emerging ministry is what pulls the congregation through the liminal "doorway" of the present and into its future. The congregation engaging what is emerging in prayer and conversation in multiple contexts allows the vision for the future to be discerned and for conversion to the future to happen. To encourage a heart that is ready to discern the Holy Spirit, communicate and practice the axiom below:

# INTRODUCTION (CONTINUED)

**Where have we been and what affects where we are going?** The church that followed World War II had a clear and widely shared mission within the community: to restore an entire generation from wartime to peacetime and provide places of healing and reconciliation. The church helped people to carry the personal costs of war, a place to give back the stories of war to the community that sent them, easing the individual cost by taking on the burdens of memory. The church developed many strategies to help the young men and women and the families they built, to carry these burdens providing support, healing, community and a solid sense of a good future.

The vast network of Sunday schools, Christian education professionals, youth groups, men and women's groups, adult education all flourished in support of the mission of restoring people from war. Churches undertook religious education that emphasized peace and understanding. The rebuilding of the world was taken on with the same community fervor and bonding with which they went to war. Ecumenism and interfaith dialogues began, and young Americans fanned out across the globe in service to the "least of these" to rebuild the world. The hope of a world where the horror of WWII would never happen again united the land. It was a mighty, life-giving mission. It ended in the early 1980s, when the last of the boomers graduated from High School, and deep community connections began to fray.

We no longer share a universally understood mission in our communities with inter-dependencies that cross ages, class, race and geography. However, we continue to use the post WWII mission strategies of Sunday school, youth groups, and adult education, all mostly pinned to Sunday morning. Strategies and models are not a mission in themselves. Without a mission focus, that develops strategies to further the mission and mutually build up church and community, churches lose community connection and relevance. The internally focused, maintenance based church develops in this lost community relationship gap. A transactional service provision model with fundraising and a "butts in the pews" focus develops that is not life giving, internally or externally. Maintenance is not mission.

Some churches started to recognize loss of momentum in the 1990s and 2000s and developed internally focused mission statements without community engagement. Full of good words but without the external relationships necessary to bring them to life, many of those mission statements are gathering dust. The church is the institution that exists not for itself alone, but to serve the world God loves. The church loses transformational or redemptive potential when we abandon community mission focus. We are blessed to be a blessing, not to be blessing hoarders. It may mean letting go, or putting aside some "traditional ministries" as we've "always done them" since WWII, and opening up to adaptation, fresh expressions, and new life. Discernment of God's vision tuned to today's community mission needs, brings clarity and joy. We know why we do what we do, and are active and willing partners with God.

The community distance and church isolation is what gave rise to the development of Open Doors New Futures. The church is not the only institution that is struggling. There's an acronym for the state of struggle: **VUCA**.

Big changes have been affecting all of our community institutions. All of us are in similar situations across the country and across institutions, the church included. VUCA is an acronym describing our current world change context. It is used to understand the unseen drivers of difficulty we are facing. See the outline on the next page, and see if it describes your experience in the last several years.

See the explanation on the next page, and see if it describes your experience in the last several years.



# INTRODUCTION (CONTINUED)

## VUCA

<u>V</u> olatile	<u>U</u> ncertain	<u>C</u> omplex	<u>A</u> mbiguous
The environment demands you react quickly to ongoing changes that are unpredictable and out of your control	The environment requires you to take action without certainty	The environment is dynamic, with many interdependencies	The environment is unfamiliar, outside of your expertise

*There is a corresponding use of the acronym VUCA that opens ways forward.*

<u>V</u> olatile	→	<u>V</u> ision
<u>U</u> ncertain	→	<u>U</u> nderstanding
<u>C</u> omplex	→	<u>C</u> larity
<u>A</u> mbiguous	→	<u>A</u> gility

To have purposeful movement in a **volatile** setting, **vision** is needed. In the ocean amid big waves (volatility) if you can see land, you have your direction. Vision provides the “land,” or future you are headed towards, shaping your decisions, and determining your path.

**Uncertainty** arises in the **understanding** gap and occurs when the people inside the church do not understand the experience of the community outside and around the church. Speaking with neighbors and partners in the community surrounding the church builds understanding and reduces uncertainty. We aren’t guessing or assuming our neighbors needs and aspirations, we have direct information.

**Clarity** helps reduce **complexity**. The glut of information, overscheduling, and a 24-hour news cycle increases our sense of complexity and overwhelm. Past solutions frequently don’t work today, and yet we still do them with fewer people and without the results we desire. As we gain knowledge about our actual neighbors, clarity of direction and decisions increase, complexity and opacity reduce. Visioning on what to do in ministry based in real time relationships becomes easier.

**Ambiguity** is the experience of knowing what we once did no longer speaks in powerful ways to our neighbors, and we do not yet know what will. God is generous and there are many ways to serve our neighbors. **Agility** is the ability to meet needs in a variety of ways and embrace experimentation with new ideas. Developing agility in responding to change will help the church community build resilience, stay connected to their neighbors’ needs, and God’s presence in real and transformative ways. We all have recent experience of the church’s ability to pivot and respond with agility during the Covid-19 pandemic. The Open Doors New Futures process helps build thoughtful agility without crisis.

The spiritual journey of Open Doors New Futures helps congregations address the volatility, uncertainty, complexity, and ambiguity present in the world, their church, and the lives of your neighbors. Through parishes exploring their neighborhoods, churches build love, understanding, and connection with their neighbors, seeing their lives with fresh eyes. When the church invites the neighborhood into discernment, people experience the church hearing and responding to the real issues impacting them. The parish gains new insight, connections, and inspiration, and new vision emerges. Engaging the emerging vision builds discernment and clarity of God’s leading.

# INTRODUCTION (CONTINUED)

Open Doors New Futures Mission Search is not about developing a new mission statement. The standard practice for developing a mission statement is to look at what the current congregation is doing, where it is doing it, and asking why it is doing it. Open Doors New Futures does not create a statement that describes the current reality. Open Doors New Futures is looking for a new chapter of mission, that will be rooted in the values of the parish but may look very different from what the parish is doing right now.

Open Doors New Futures is an adaptive change process rooted in the work of the Harvard Business school and adapted for churches by Susan Beaumont in her book, *How to Lead when You Don't Know Where You Are Going: Leading in a Liminal Season*. Beaumont identifies four things that need to be attended to in order to move into what God is calling us to do:

- Deepening communal discernment
- Mining institutional memory
- Clarifying purpose
- Engaging emergence

Adaptive change is building on the best in a congregation and adapting it for the future of the church. This work literally leads to opening the church doors, going out, and finding new people to love in ways that meet their deepest needs. Open doors New Futures Mission Search helps congregations in building love and connection in the neighborhood, serving those whom God calls you to, and who God calls to you. You may create a new mission statement on the other side of your discovery process, but it is not the goal of this work. We are looking for those whom God wants to love in your neighborhood or town through your congregation, in this time, and for the needs of today.

## The Interim Period

During the Interim period, the work of the Interim Cleric is to teach and practice the skills of discernment prayer and to address the following six tasks for Congregational Development: (See Interim Clergy Handbook for detailed description of goals and objectives)

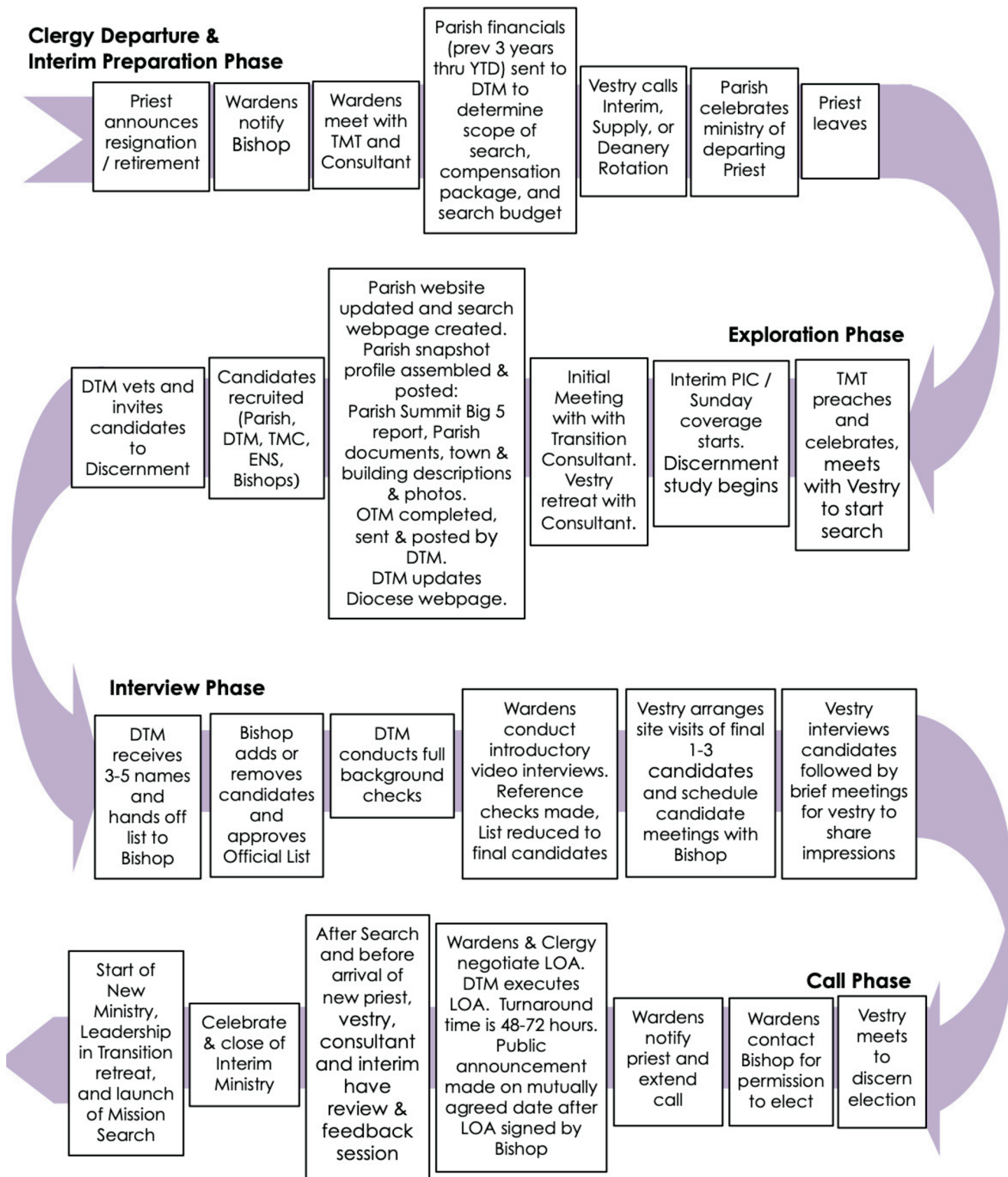
- Do the work of teaching, preaching, liturgy, pastoring, and vestry leadership development. Do them well.
- Conduct a congregational assessment.
- Help the congregation understand the “seismic shifts” in American culture: “Why do we do what worked before and experience diminishing results?”
- Review and update parish records and business practices
- Practice the gift of St. Barnabas, “Son of encouragement.”
- Address spiritual formation needs, especially when church business is conducted as if God is not present.

It is expected that the Consultants and Interims will be in conversation at monthly Consultant and Interim meetings. At some points of conflict or volatility in the congregation an Interim may request a conflict or working process consultation with a Clergy Search consultant.

The amount of time required for the clergy search can have many variables. Depending on the capacity of the vestry it can be as little as six months and as long as two years. Things that can hold up a search are availability of candidates, a failed first slate leading into another search, or intra-congregational conflict. The financial circumstances of the parish may change decisively during the Interim time leading to re-evaluation of capacity to call a clergy partner. Encourage the Wardens to speak to the Interim Clergy and/or contact the Transition Ministry Team.

This handbook is divided up into the four phases of the Clergy Search: Clergy Departure and Interim Preparation, Exploration, Interviewing, and Call. The diagram on the next page illustrates the steps and activities that occur in each phase. This handbook gives in-depth description of each step and provides additional resources and procedures in the Appendices.

# OPEN DOORS NEW FUTURES CLERGY SEARCH



TMT: Transition Ministry Team  
DTM: Diocesan Transition point person  
OTM: Office of Transition Ministry

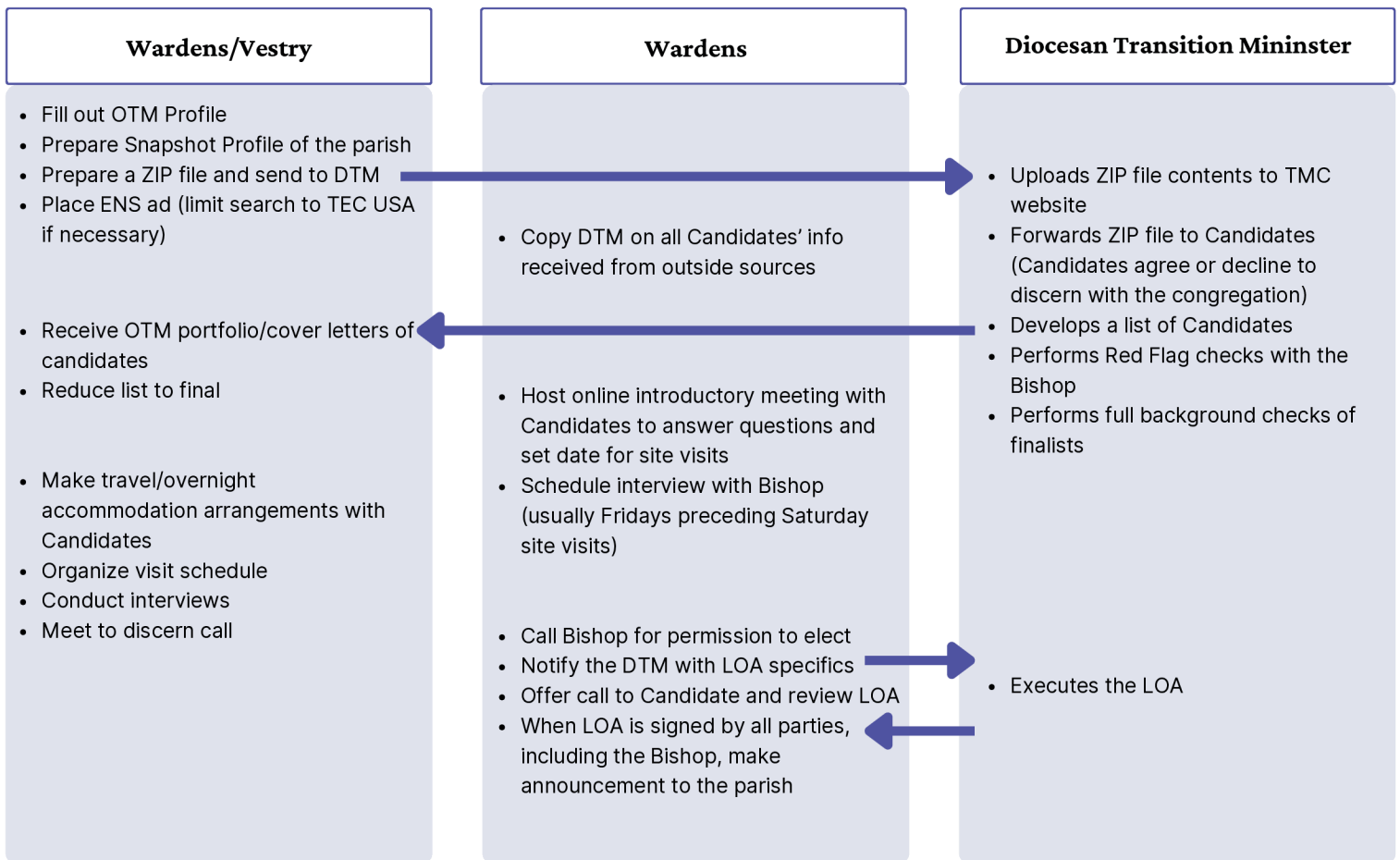
TMC: Transition Minister's Conference  
ENS: Episcopal News Service  
LOA: Letter of Agreement



# OPEN DOORS NEW FUTURES CLERGY SEARCH

The diagram below outlines the roles and responsibilities of the Wardens and Vestry together, the Wardens only, and the Diocesan Transition Minister. The sequence of the steps is denoted by the listed order, the spacing, and the arrows that denote a specific transfer of information.

## ROLES & RESPONSIBILITIES IN EXPLORATION, INTERVIEWING & CALL PHASES



# PHASE 1

## CLERGY DEPARTURE AND INTERIM PREPARATION

### **Initial Meeting with the Vestry and Diocesan Transition Minister**

After the announcement of the priest's departure, the Transition Ministry Team will make contact with the wardens and meet with the vestry as soon as it is possible. The purpose of this meeting is to aid the lay leadership in assuming their formal canonical roles in the absence of a priest and to make provisions for a thoughtful transition, including the process of identifying short-term (supply) and long-term (Interim) clergy to aid the parish in the transition.

The Transition Ministry Team will explain the two-part Open Doors New Futures process: the Clergy Search and the Mission Search in an overview of the journey ahead. A more detailed formal discussion about the Clergy Search and Mission Search happens after the priest has departed the parish. It is helpful to have the Transition Consultant present at this meeting so that all have a clear understanding of the communications that take place. The greater the communication among all parties, the greater the opportunity for a smooth transition period.

### **Establishing Financial Guidelines of the Clergy Search**

While the consultant is not a part of the following financial determinations, it is important to be aware of the circumstances regarding how they are decided.

#### **Determining the scope of the search**

At the beginning of the Clergy Search, the Wardens must submit a financial statement of the previous 3 years through the current year to date to the Transition Minister and the Office of Finance. If financial health is in question, the call will be for a Priest-in-Charge. If the congregation's financial health is sturdy, they may call a Rector.

#### **Determining a clergy compensation package**

The vestry must begin determining a compensation package for their new clergy partner at this point in the process. It is essential that the congregation be honest and transparent about the compensation offered. There are diocesan guidelines to be followed in setting the financial terms. Diocesan policy requires that any full-time parochial priest must be paid at least the minimum total clergy compensation and benefits as determined by Diocesan Convention. To see compensation packages based on different stipend amounts, contact the Diocesan Human Resources Officer.

Some items to be considered in an appropriate compensation may include:

- The compensation of the outgoing Rector/PIC
- The compensation packages of rectors in similar parishes
- The nature and scale of the work expectations of the Rector/PIC
- The years of experience held by the candidate

#### **Determining the clergy search budget**

The Clergy Search will require a budget. The budget should include monies apportioned to cover the website update, consultant fees, clergy travel, food and lodging, interviews, and moving expenses. The congregation is responsible for the fees paid to the Consultant and should make an arrangement with the Consultant for payment as per the Consultant's Contract.

# PHASE 2

## EXPLORATION

### Initial Meeting with the Vestry

The Transition Consultant will facilitate an initial meeting with the vestry. It is here that the vestry and the Consultant begin to negotiate the terms of their relationship, including the Clergy Search, the development of the Parish Profile webpage, and the Open Doors New Futures Mission Search. This is an important meeting for focusing the work that lies ahead. The Consultant will charge the vestry with the task of identifying and commissioning 2-3 people, from within or outside of the vestry, who will eventually become the Writing team. Their job is to refine the information gathered from the Parish Summit for the Profile and to shape the responses for the Parish OTM profile.

In the body of Christ, no one vestry member possesses all the gifts, rather we need one another. Also, no one 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 in the vestry and writers groups:

- Team player
- Spiritually sturdy person of prayer
- Can maintain confidentiality
- Communicant in good standing (attends church regularly, giver of record, gives of time and talent)
- Comfortable with the work of assessment (Teachers made good writing team members)
- No hidden agendas
- Willing to work for the good of the church and not partisanship
- Willing to set aside time necessary to engage in the search work

Elicit from the group the behavioral expectations they think are appropriate.

To meet the needs of the times, with uncertain availability of Interim or Supply clergy, the transition process has changed, and the time shortened. There are two important reasons for this:

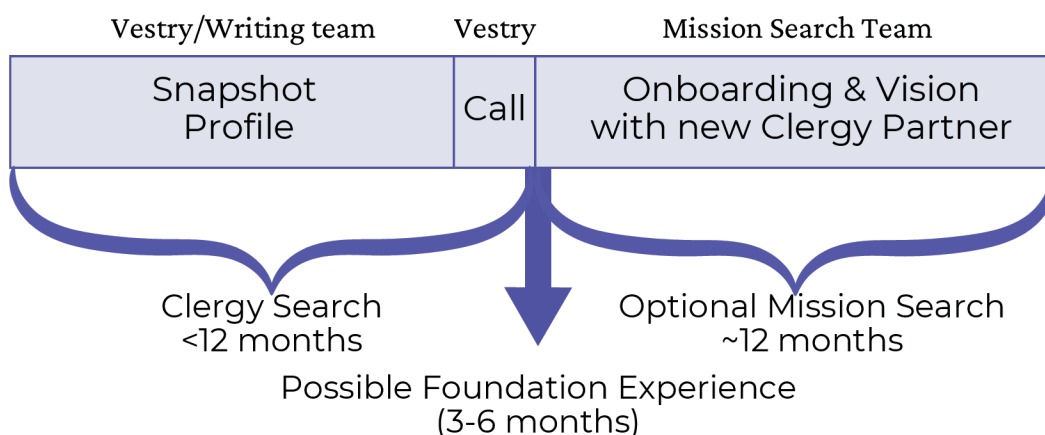
- There are fewer clergy searching and fewer clergy profiles to read through.
- Congregations frequently do not have the reserves, in people or finances, for a long interim period.

In the past, the work of forming and training a search committee, extensive self-study, and vision work occurred during the interim period. With the current shortened search process, this work has been moved to the time after the congregation's call of a new clergy partner. This allows a congregation to fold in the insights and capacities of the new clergy partner into the work of developing the vision, the story telling, and relationship building that is at the heart of the Open Doors New Futures process. The vestry will perform the work of the Clergy Search.

### How the Clergy Search was lead in the past (1.5-2 years)

Search Committee	Search Committee	Vestry
Self Study	Vision	Call

### The Search Process today: Open Doors New Futures





# EXPLORATION (CONTINUED)

## Vestry Retreat

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ (3 hours)

*Vestry, Writing Team, Interim PIC, and Consultant*

### Description:

The Consultant conducts a Clergy Search Vestry Retreat introducing the tools for discernment: the principles of Appreciative Inquiry and the spiritual work required on behalf of the vestry. The difference between discernment of a call and corporate hire will be discussed. The Consultant introduces and clarifies the four phases of the transition. This vestry retreat will help lay the important foundation for the upcoming Parish Summit: The 5 Big Questions.

### Goals:

- Develop awareness of the process of the clergy search
- Develop understanding of essential strengths, gifts, and blessings of the parish and any concerns, deficits, and challenges
- Identify the core values of the parish in order to assist in discernment
- Experience discernment skills of study, prayer, imagination, and empowerment
- Deepen understanding of fellow vestry members

### Pre-work:

- Make copies of the four phases of the Open Doors New Futures Clergy Search.
- Have Bibles or Romans 12:1-2 available for contemplation.
- Create necessary newsprint and/or powerpoint for presentations.
- Ask retreat participants to bring an object with meaning to them.
- Prepare copies of clergy themes and specialties from the OTM file. Appendix A
- Make arrangements for food and room set-up consisting of a circle of chairs with a small low table in the middle to hold a candle and the special objects people have brought.

### Agenda:

- **Prayer for discernment**  
*Since I will do what you want of me, I pray you, send your Holy Spirit to me: into my mind, to show me what you want of me; into my heart, to give me the determination to do it, and to do it with all my love, with all my mind, and with all my strength unto the end of my life. Amen.*
- **Gathering**
  - Ask participants to gather with their object of value and sit in the chairs in a circle. Light the candle in the center table, introduce yourself, and welcome participants to the day and outline the agenda.
  - Starting with yourself and modeling brevity, introduce your special object of value, and invite all vestry members to briefly do the same.
  - “Did you learn anything about your fellow vestry members that you did not know?” “Can you identify the values that will be useful in the tasks of the discernment process?”
  - Note that we all bring our values to the process, and we work to understand what our values as a community of Episcopal followers of the Jesus movement are. So first we will hear from Scripture and tradition to tune our hearts to the key of love.

# EXPLORATION (CONTINUED)

## Vestry Retreat (continued)

- **Scripture and Reflections**

- “All I'm saying is simply this: that all life is interrelated, and in a real sense we are all courting an inescapable network of mutuality, tied in a single garment of destiny. Whatever affects one directly, affects all indirectly. For some strange reason, I can never be what I ought to be until you are what you ought to be. And you can never be what you ought to be until I am what I ought to be. This is the interrelated structure of reality.”
  - What do you understand from this reading?
  - How do you see that related to the search?
- *Therefore, I urge you, brothers and sisters, in view of God's mercy, to offer your bodies as a living sacrifice, holy and pleasing to God - this is your true and proper worship. Do not conform to the pattern of this world, but be transformed by the renewing of your mind so that you may discern what is the will of God - what is good and acceptable and perfect. Romans 12:1-2*
  - What word or phrase stood out for you?
- What spiritual practices will facilitate detecting and discerning the will of God?
- What might be different considerations between a corporate hire and our work of discernment for God's call to ministry?

- **Introduction to Appreciative Inquiry**

- In groups of two, participants interview one another with the following questions, paying attention to your partner's answers to present to the group:
  - Who are you? (Consultant is the role model by first answering “Who am I?”). Choose a story prompt from [Beloved Community Storytelling](#) downloadable booklets to help people share who they are.
  - What do you really love to do? Tell us a story about a time when you got to do something that you really love to do that left you feeling satisfied?
  - Without being humble, what are the things you value most about yourself – as a human being, as a parishioner?
  - What do you think is the core value of this church?
  - What is it about the Episcopal Church that you value? What is the most important thing that this parish has brought into your life?
  - If God gave you three wishes for the Vestry Clergy Search, what would they be?

- **The Mission of the Vestry for a Clergy Search**

- The prime objective of the Vestry Clergy Search is to call a new Rector/PIC for the Parish.
- Discerning the Call: Can we and this candidate enter into a relationship with God, to be the people of God, and fulfill our new chapter in mission and ministry?

# EXPLORATION (CONTINUED)

## Vestry Retreat (continued)

- **Review of Roles and Responsibilities of the Vestry in the Clergy Search**
  - Roles
    - Assessment: establish criteria
    - Discernment: develop skills for awareness of Holy Spirit in the call
  - Responsibilities
    - Developing a Parish Snapshot Profile
    - Preparing the Parish OTM Profile
    - Preparing the website and Clergy Search webpage
    - Providing regular updates to the congregation with the status of the search
    - Screening potential candidates
    - Assessing the skills of potential candidates
    - Discerning alignment of call for this parish
- **Starting the Work of Discernment and Search: Tasting a Vision of the Future**
  - Ask the group to close their eyes and imagine: “It is two years after your call. Everyone is talking about your parish as the place to experience God.”
    - What do you value most about what is happening at your church?
    - What do you value most about the Rector/PIC?
    - What are the challenges you have overcome?
    - How is the vision and mission of your parish being advanced?
- **Conclusion:** What are the skills and capacities that the congregation and new clergy partner you will need to embody this vision? Remind them of the MLK reading if necessary. Record on newsprint and post.
- **Preparing for the Parish Summit: The Five Big Questions**
  - Name 5 Big Things about us
  - Name up to 5 landmines or issues
  - Name 5 ministry opportunities or potentials
  - Name 5 big learnings during the pandemic and shutdown. Growth? Change?
  - Name 5 themes and specialities (attributes, qualities, skills, capacities) we are seeking in a new clergy partner (shift demand language to seeking language)
- **Next steps**
  - Developing a timeline: desired date for new start and then plan backwards from it
  - Set the Parish Summit date
- **Closing Prayer:** Go around in the circle, ask each participant to pray for the search and one another.



# EXPLORATION (CONTINUED)

## Parish Summit: The 5 Big Questions

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ (2.5- 3 hours)

*Vestry, Interim PIC, Consultant, and Congregation*

### Description:

A parish wide summit, usually held after Sunday worship to collect the data for the snapshot profile.

### Goals:

- To develop a clear, shared understanding of their values
- To build an accurate snapshot of their church for their search
- To engender a sense of considerable excitement and optimism for the future of the congregation and create support and enthusiasm for the Clergy Search process and the Open Doors New Futures Mission Search

### Pre-work:

- Prepare newsprint and/or powerpoint slide of the Goals for the summit and post in the room.
- Prepare copies of clergy themes and specialties from the OTM file. Appendix A
- Designate someone to arrange for room organization, supplies, and food provisions.
  - Tables and chairs for all, set for 5-6 people per table
  - Easel with newsprint and markers
  - Paper pads with pens at each table
- Designate a scribe to write a summary of this event. Emphasize that the report is to be a narrative and not just a listing of bullet points. Set a deadline of 2 weeks for completion.
- Notify Warden to prepare welcome remarks (not to exceed 5 minutes.)

### Agenda:

1. **Warden:** Offers the welcome, speaks to why we are here, and reads the Goals of the Summit.
2. **Consultant:** Introduction to the day, and overview of the Clergy Search and Mission Search process. "Your conversations will be turned into a report for the information packet that will be sent to your candidates."
3. **Appreciative Inquiry question:** (60 minutes)
  - **Tell a story** of when you felt the presence of God most deeply in your church. Describe a time when you felt excited and glad to be a parishioner at your church. What made the experience life-giving?
  - **Large Group share:** What words/threads did you hear repeated in each other's stories? (10 minutes). Record on newsprint.
  - **Share in small groups:** What is the single most important thing that this church has contributed to your life? Tell about a time when you felt most valued here? What do you value about being an Episcopalian (15 minutes)
  - **Large Group share:** What words/threads did you hear repeated in each other's stories? (10 minutes). Record on newsprint.
  - **Mining our stories for values, finding the good and building on the best:** Listening to your stories, what are the things your group values deeply about your church? (15 minutes)
  - **Identify core values:** As people share experiences, write down the basic elements of their story. Have the group examine the notes and identify themes and patterns. These will give you basic information about the values of the congregation. Remind them that any of their plans that do not include these values will most likely not be fruitful. These values are where the community finds connection with God giving them life and positively building on this will bring this life to new plans.
4. **Break** (10 minutes)

## EXPLORATION (CONTINUED)

### Parish Summit: The 5 Big Questions (continued)

#### 5. The 5 Big Questions (80 minutes)

- For each question: 10 minute discussion in small groups, appoint scribe for 5 minute rapid report
- Record answers in rapid reports on newsprint using hashtags for duplicates
  - a. Name 5 Big Things about us
  - b. Name up to 5 landmines or issues
  - c. Name 5 ministry opportunities or potentials
  - d. Name 5 big learnings during the pandemic and shutdown. Growth? Change?
  - e. Name 5 themes and specialities (attributes, qualities, skills, capacities) we are seeking in a new clergy partner (shift demand language to seeking language)
- Review: Ask the group if the answers accurately reflect the parish reality. Are there any standout observations?

#### 6. Conclusion

- Make sure all notes are handed to the vestry/writing group.
- Meet with scribe to review next steps:
  - Take photos of all newsprint/notes.
  - Write a summary of the summit, emphasizing that the report is to be a narrative and not just a listing of bullet points.
  - Set a deadline of 2 weeks for completion. Send a copy to the consultant and vestry/writing team.

# EXPLORATION (CONTINUED)

## **Preparing the Congregational OTM Profile**

As a part of the digital Parish Profile, the Vestry/Writing team and Consultant prepare the congregation's OTM Profile. OTM stands for the Office for Transition Ministry, a ministry of the national church. The OTM maintains and develops the database of all clergy, congregations, and institutions in the Episcopal Church. The OTM Profile is an important tool for identifying clergy who might be good candidates for the congregation. In reverse, the parish's presence in the OTM database makes it possible for searching clergy to discover them.

The OTM Profile includes information that is readily at hand from the Parochial Report (i.e. basic parish data, average Sunday attendance etc.), the Annual Report or parish strategic plan, the Parish Summit: The 5 Big Questions report. The OTM Profile includes information such as names of former rectors, and the compensation (including housing) offered for the new position, and questions describing the life of the congregation. The Profile will help the Transition Ministry Team identify qualified candidates to be invited into the search process. This is not the only tool for calling clergy, but it is very helpful. Appendix B.

## **Preparing the Search Webpage**

Following the vestry retreat and the parish summit, the Vestry/Writing team will prepare a parish website search page. This webpage contains the welcome and the identity of the parish that briefly describes the personality, mission, and ministry of the congregation, and focuses on the uniqueness of the parish. It also includes the passions and gifts for ministry that it is seeking in its next clergy partner. The text is drawn from the parish summit. It is highly suggested that photos be taken of the current congregation engaged in various activities that are important to the parish faith and life and be included on the webpage. Remove out of date photos. Provide a link to the parish history. The webpage must include photos of the Rectory if there is one, accompanied by a floor plan or description of rooms and facilities.

The webpage must clearly outline the compensation/benefits package page of the OTM that has been approved by the vestry for the position and whether or not there is room for negotiation. (A review of compensation may be necessary if no candidates can be secured at that level of compensation.)

The description of the congregation contained in the parish profile is meant to be a current representation of the community of faith on which the wardens, vestry, and congregation agree. In the experience of discernment, reflection, collaboration, and self-definition, a congregation grounds itself in reality, relying on more fact than wish or simply focusing on the projected abilities desired 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. A link to the Diocesan website is always a good idea.

The completed webpage must be reviewed by the Diocesan Transition Ministry Team before going live. Examples of parish webpage profiles may be found on the Episcopal News Service Jobs & Calls page.

# EXPLORATION (CONTINUED)

## Preparing the Digital Parish Profile

The digital profile is comprised primarily of documents that are already available. The digital format significantly reduces the work of the profile writing team and bases the profile more on fact than wish or memory. Candidates are seeking transparency in profiles and honest assessment of the parishes with which to engage in discernment.

The digital parish profile is created with the following reports and documents:

- A gracious letter of invitation to discernment from the Wardens: This invitation to discernment letter should describe the spiritual life and hungers of the congregation and the congregation's commitment to seek a new chapter with the newly called clergy partner through the Open Doors New Futures Mission Search discernment process. Candidates are praying to be led to their call; describe how you are praying for them and the church's next chapter. Always include the contact information in the letter.
- A list of vestry members and their roles: This is a short description of the co-laborers in ministry for each vestry member's ministry as committee/liaison position i.e. Jane Doe: liturgy liaison with LEMs, Acolytes, Choir, works closely with Rector in scheduling and planning; or, John Doe: Finance Chair, works closely with Rector and Treasurer in producing monthly reports and budgeting, leads year-round Creation Care stewardship activities.
- Parish Summit: The 5 Big Questions report: This report includes all the important bullet points of the 5 Big Questions answers with short narrative explanations where helpful or necessary, ie: 5 Big Things about us: St. Swithun's Mighty Cleats soccer team: St. Swithun's members coach a soccer team for unhoused youth from the local shelter, organizing games, providing sport resources, and mentoring youth. Members attend all games and cheer for the Cleats. 5 Obstacles or pitfalls: Aging infrastructure, roof leaks in sanctuary, out of code kitchen; 5 Specialties or Capacities in a clergy partner: Community connector: we seek to reestablish connections with our wider community to use our time and space more wisely.
- The OTM (Office for Transition Ministry) profile with the compensation offer page. Appendix B
- The OTM narrative: The writing team creates the final draft of the OTM parish profile. Appendix B. Draw answers from The 5 Big Questions report, Annual Report, Parochial report, advertising, and website.
- Current Annual Report and Annual Budget
- Year to Date Budget Actuals
- Parochial Report: most recent year
- Certificate of Audit
- Basic neighborhood/town description with links to important institutions, facilities, and amenities
- Current pictures of the Church: with people and buildings featured throughout
- Pictures of the Rectory: interior and exterior, with floor plan or description of rooms and facilities
- History of church: short and concise

Clergy are interviewing the vestry as well. These are characteristics that clergy are seeking information on:

- |                       |                                                         |
|-----------------------|---------------------------------------------------------|
| • Hospitality         | • Spiritual Vitality                                    |
| • Morale              | • Readiness for Ministry                                |
| • Leadership          | • Engagement in Education                               |
| • Conflict Management | • Community Engagement (partnerships and relationships) |

A resource for understanding and articulating parish health is found here: [Characteristics of Vital Congregations \(Open Doors New Futures, Diocese of NY\)](#)

The wardens or other designated writer collects all the materials and assembles into a Zip file, which is sent to the DTM for approval before being sent out or uploaded onto the website. Make sure photos included are in slideshow format and not a file with separate JPEGs.

# EXPLORATION (CONTINUED)

## **Finding Candidates**

At this point the congregation is said to be “Receiving Names” and begins accepting applications from interested priests. The Diocesan Website should move the congregation from Interim to Receiving Names with a direct link to the parish website and profile.

It is recommended that an advertisement be written for the Episcopal News Service. The Transition Ministry Team will review the ad before posting. What to keep in mind as you write your Episcopal News Service advertisement:

- The first two weeks are free. After that you will be emailed to select rate of ad exposure at varied costs.
- Read through current ads, with similar calls, ie urban Rector, suburban PIC, Associate, Rural, half time Rector etc., and note what is appealing or appalling in how the description is written. Visit: [episcopalnersservice.org/jobs/](http://episcopalnersservice.org/jobs/)

As you compose the content of the ad:

- Communicate with who may be reading the ad.
- Focus on the church’s future not the past.
- Mention Open Doors New Futures mission search with the congregation following the clergy call with a link to Diocesan Open Doors New Futures program.
- Mention why and how your church is a good opportunity for the cleric/family.
- Speak about where the Holy Spirit life and joy is found in the church’s life.
- Give an honest depiction of the church size, resources, and ministry.
- Note what clergy strengths would be a good fit.
- Note where they can find out more about the church and community.
- Mention how candidates should respond, what they should send, and who should they contact.

For a Clergy Search, applicants will be sending materials directly to Wardens. However, they will also cc their materials to the Transition Minister.

The vestry normally receives names from the following sources:

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

During this time of receiving names, remind the vestry that it is essential that the vestry commit themselves to discretion and confidentiality. It is very harmful to the integrity of the process if a vestry member leaks information to anyone in the congregation, including a spouse or other family member during the search process. The vestry must understand that generally, prospective candidates have not yet informed their own congregations that they may be in search. Equally important is to provide for the security of emails and search files throughout the process. Appendix C

While the conduct of the deliberations and the names of nominees must remain confidential, it is important to communicate on a regular basis with the congregation on the progress of the search. Parishioners may feel left out and that nothing is happening. Vestry members can give oral updates during announcements or parish functions. If new members are elected to the vestry in the course of the search, bring them up to date on the status of the process.

No clergy, associates or curates, are eligible to be called as rector or vicar in the church they currently serve. Although at times, the associate or curate may function as an Interim PIC, they will depart at the conclusion of the Clergy Search.

# PHASE 3

## INTERVIEWING

### **Consultant keeps the vestry informed of the timeline in the Interviewing Phase**

- Once the period for receiving names has passed, (generally 6-8 weeks) the vestry's task is to sort through the candidates' materials, to the end of narrowing the field to create a working list of 3–5 serious candidates. Eliminating candidates on the basis of the clergy OTM Profile alone is not a recommended practice unless it is clear from a close reading that the candidate is unsuitable. Let the candidates know their status as soon as you have discerned it giving them a timeline with potential dates for further discernment or thank them for their time and interest. Appendix D
- Once the vestry has developed the working list, it should be submitted to both the Transition Ministry Team and the Bishop's Office along with the names and the dioceses in which the candidates are canonically resident. The Transition Ministry Team will engage in conversation with the candidate's Transition Minister, and the Bishop's call to the candidate's Bishop will be done. The formal background check begins. The names of the finalists should be forwarded to the Bishop's Office as soon as possible. No Letter of Agreement may be signed without a completed background check. The Bishop's office communicates with vestry throughout the process and reserves the right to add or remove names on the slate.
- From the working list of 1-3 names, the Wardens invite the candidates to an introductory zoom meeting to ask two prepared questions and to answer any questions the candidate may have. Vestries may wish to have the wardens' meeting recorded. This would also be the time to review with them the Parish's financial status and clarify if the call is for a Priest-in-Charge or a Rector. It is important for the candidates to have a clear picture of the church's financial stability at this time in the process. Following the zoom calls, if there is a candidate that will not continue in discernment, they are notified right away with thanks. Conversely, a candidate may contact the wardens to withdraw from the process. Appendix D
- Throughout the screening process, the vestry, as a courtesy, must notify in writing those candidates whose names are no longer under consideration. It is important to remember that clergy in search often put their lives on hold or have to make important decisions with respect to their lives and/or their families as their own search processes unfold. Not informing them in a timely manner about the progress of the search not only shows a lack of consideration for the candidates, but also reflects poorly on both the congregation and the Diocese. Appendix D
- The wardens will contact the Bishop's Office to schedule a meeting between each of the final candidates and the Bishop. The purpose of this meeting is to acquaint the candidate with the Diocese of Long Island and to establish a relationship with the Bishop of the Diocese. This is normally done during the candidate's visit to the parish for the personal interview with the vestry. Requests for appointments should be made at least a month in advance of the candidates' visits. The Bishop's preferred days for candidate meetings is Friday.
- Following the Bishop's meeting and the vestry's interview of the finalists, the Bishop's may provide his council to the vestry prior to its discernment to share impressions of the candidates, as well as information learned from the Bishop's and the Canon's conversations with their counterparts concerning the candidates.



# INTERVIEWING (CONTINUED)

## **Consultant prepares the vestry for interviewing**

While the candidates are being recruited, the Consultant prepares the vestry for interviewing with the following activities and trainings:

- Identifying and prioritizing themes and criteria
- Crafting STAR format interview questions
- Rating criteria
- Reading OTM profiles and Anti-Bias training
- Mock interview with debrief
- Review of onsite interview schedule and accountabilities
- Discernment workshop

## **Identifying and prioritizing themes and criteria**

In preparation for crafting interview questions, the vestry will do the work of defining what they are looking for in a candidate and clarifying the priorities of the parish versus focusing on qualities that are nice to have. For the calling of a new Rector/PIC to be a good match and lead to a fruitful partnership with less chance of disappointment on either side, it is important to spend time with this step, as this is an opportunity to ensure that the interview questions are specific to the desires, needs, and hopes of the parish and are linked to the concerns and leadership themes that surfaced at the Parish Summit and Vestry Retreat.

See Appendix A for examples of different areas of ministry specialties.

## **Agenda:**

- Review the notes from the Vestry Retreat and Parish Summit.
- Consider the themes and their criteria that you think are essential to include in the conversation with prospective candidates.
  - Criteria should be:
    - Behaviorally observable
    - Specific, objective and unambiguous
- Each person/small group writes down 3 themes and 3 criteria and why they are important.
- The work of the vestry is to discern which themes and criteria will be used to develop interview questions and prioritizes them.

# INTERVIEWING (CONTINUED)

## Crafting STAR format interview questions

- “Past behavior is the best predictor of future behavior.”
- “Assess behavior, not theory about behavior.”

This technique originated in the late 1990s. It is based on the theory that a person’s behavior does not fundamentally change over the course of their adult life. The manner in which they have performed in the past in certain vocational areas is a good indicator of how they will perform in similar situations in the future. (UTSA University Career Guide.). The questions are competency based. For example, you have reviewed the Parish Summit and the OTM prepared by the vestry and have identified the critical knowledge, skills, and abilities needed to meet these job responsibilities. Behavioral based questions require candidates to describe Situations, Tasks, Actions, and Results/outcomes from their past experience.

One particularly useful and popular approach to developing behavioral interview questions is this STAR model. (Situation, Task, Action, Result). The STAR model helps candidates frame their responses to behavioral questions by encouraging them to respond with a story about a past behavior.

S	Situation	A description of the situation
T	Task	The task that needs to be completed
A	Action	Describe the action that was taken
R	Results	What happened? How did the event end? What was accomplished? What was learned?

This method helps you sort out behavior and experience from theory and hypotheticals. Past behavior is the greatest predictor of future behavior.

1. First consider the **behavior** about which you want to ask a question. You can combine it with any focus area creating a question that has the STAR components of situation/task, action, result.
2. Start the question with a positioning statement, a stem, such as:
  - Think about a decision you’ve made...
  - In your work at...
  - All of us have gone through times when things didn’t go the way we planned...
  - Here at our church we have experienced...
3. Question stems are open-ended interrogative phrases that represent the initial data-seeking portion of the question. Include a question stem in the body of your questions such as:
  - Tell us about a time when...
  - Describe a time...
  - Give us an example of...
  - Walk us through a time when you...
  - Tell us about a recent...
  - Describe a significant example of...
  - You may take a more congenial approach using stems such as, “Can you tell us about a time when...” and “Will you share an example of...”
4. The question stem sets the focus for the question such as, at our church, tell of us a recent... and seeks specific examples of a situation, action, or result that relates to the data sought in the candidate’s key actions.

# INTERVIEWING (CONTINUED)

## Crafting STAR format interview questions (continued)

### Example:

**Theme:** Living in a Community with Changing Demographics

**Lead-in:** Our parish values its long-term congregants while striving to bring in new people within our ever-changing neighborhood.

**Question:** What experience have you had as a leader in a changing community? Tell us how you have discerned needs within your parish and the surrounding community, how did you bring them together, how did this impact your parish health?

**See Appendix E for a list of Forbidden Questions.**

### The vestry crafts 5-10 STAR questions

The Consultant helps the vestry to refine and prioritize the questions by asking clarifying questions such as:

- Which of the themes does this question relate to?
- Where do you see the 5 Big Things in these questions?
- Which questions will give you the information you are seeking regarding {your themes}?

**Information and STAR Training Highlights:** (more details and resources can be found in STAR Interview Skills Training by Mary MacGregor)

### False STARS

- Sometimes the person being interviewed will give you an incomplete STAR answer. False STARS are answers that seem to give you the information you are seeking but do not give you behavioral information. There are 3 basic types of unanswered STARS:
  - Vague statements: provide no specifics of what the person actually did
  - Opinions: personal beliefs, judgments or views without stating what the person actually did
  - Theoretical or future-oriented statements: tell what a candidate would do, would like to do, would have done, but not what they actually have done

### Follow Up Questions to build complete STARS

- Thank you for your answer. Could you share with us (the action) you took and what happened as a result?
- That's very interesting. Could you tell us more about (the action) and what happened afterwards?
- Can you give us a specific example of when this happened recently?
- Describe one particular time when...
- Walk us through the process step-by-step explaining what your role was.

### Other Interview Questions

The interview will consist mostly of STAR behavioral questions. One or two questions that are specific to the candidate's resume may be appropriate. It is recommended that the following general question be asked of each candidate:

- Tell us about a time in your ministry when you felt most alive, energized, most excited. What was this time, who was involved, and why does this particular incident stand out?

# INTERVIEWING (CONTINUED)

## Rating Criteria

This section provides a method of objectively rating the skills and abilities of candidates for the position of Rector/PIC. The intention of this process is not to compare candidates with each other but rather to rate each candidate with respect to a predetermined set of job-related criteria. Simply comparing candidates does not guarantee that a qualified candidate will be selected. Each candidate must be assessed with respect to the criteria of the specific needs and character of the parish.

Clergy are notorious for their ability to theorize. Putting theory into practice is another matter. In assessing candidates, it is important not to be distracted by theorizing, even when it is presented as eloquent theology. Psychological and personnel research consistently shows that our ability to predict a person's future performance is very poor. Theories and best intentions often do not get put into practice. Research has also shown that people continue to do what they always have done. Thus the best predictor of what a clergyperson will do when selected rector of a new parish is what they have done in previous parishes. Hence assessing prior experience and its outcome is very important in the assessment process.

## Rating System for Skills and Abilities: 5 point scale

1	2	3	4	5
Poor	Weak	Acceptable	Good	Excellent
10%	20%	40%	20%	10%
Negative		Average	Positive	

1. **Poor:** The candidate's response on this factor is either totally lacking or well below that required for effective job performance. The person indicates, regardless of the reason that they have no experience or fails to report experience of the criterion being rated. About 10% of clergy would fall into this category. Parishioners would complain bitterly about performance at this level.
2. **Weak:** The candidate possess this factor to some degree but at a level below that required for effective job performance. The person indicates little or negative experience of the particular criteria. Rather than provide experience they may stress theoretically why the criterion is important, but no indication of initiative. About 20% of clergy would stumble in this category. Parishioners would grumble about this level of performance.
3. **Acceptable:** The candidate's response on this factor is adequate or at a level just sufficient for effective job performance. The person may indicate some experience and stress the theoretical implications or the importance of the criterion, but there is no indication of the outcome of their experience. About 40% of clergy would walk in this category. Parishioners would accept, but not be inspired, by this level of performance.
4. **Good:** The candidate's responses on this factor are clearly above the minimum required for effective job performance. The person indicates significant experience of the criterion but without indicating clear outcomes; or expresses desire for further training in this factor. About 20% of clergy would run in this category. Parishioners would be appreciative of this level of performance.
5. **Excellent:** The candidate possess this factor to the degree their performance would be outstanding, of extremely high quality. The person indicates considerable experience of the criterion with positive outcomes. About 10% of clergy would excel in this category. Parishioners would be grateful and enthusiastic for this level of performance.

Appendix F contains an Example of Rating Skills and Abilities.

# INTERVIEWING (CONTINUED)

## **Reading OTM Profiles and Anti-bias training**

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

### **Pre-Work:**

- Review Anti-Bias training presentation ahead of time
- Make copies of the Anti-Bias compensation slides for participants. Appendix G
- Make sure the parish has powerpoint display capacity
- Make copies of How to Read an OTM

### **Discussion on Anti-bias Training**

- What struck you?
- What surprised you?
- Do you have any experiential associations?
- What Baptismal Covenant connections can we make?
- What do we want to take with us as we read profiles and conduct interviews?

### **How to read an OTM Profile**

As a group you may elect to use blind OTM Profiles (see Additional Resources for samples), which means someone on your vestry who is both discrete and has the group's confidence, blanks out age, gender, race, and family information in the OTM Profile before sharing with the wider vestry. You will be discerning based on data and responses, rather than on personal information that may lead to incorrect assumptions. Or, you may elect to go with profiles "as is." If you do, please review important insights from the Anti-Bias training.

Throughout the OTM Profile look for where the congregation's chosen themes and criteria are aligned with the candidates capacities or experiences.

### **The clergy statement:**

- Does this person's description of their ministry pique your interest?
- From what is written, can you imagine them ministering in your church?
- How is their relationship to God described?

### **Work History:**

- How long have they been ordained?
- They may be a second vocation with considerable work experience prior to ordination. Check their Resume.
- When was their last background check?

### **Compensation:**

- Look at their whole profile first before dismissing a candidate based only on compensation. If you are looking at your present bottom line alone, you are limiting what God might do in your congregation. We are meant to practice faith, the capacity to take a holy risk to follow God, in the Clergy and Mission Searches. Don't write off a candidate because you have not yet seen what God will do in your future. Discernment of God's call is the preeminent criteria.
- What positions are they looking for? Does it match with the ministry you are listing?



# INTERVIEWING (CONTINUED)

## **Education:**

- Where did they go to school?
- Do they have any specialized training that matches your themes or criteria?
- Do they have an advanced degree, an STM (Master of Sacred Theology (one-two year program) or Doctorate or PHD? What area(s) of study?
- Do they have ministry certificates that match a theme or criteria? A Preaching Certificate or training in Appreciative Inquiry, Coaching or Conflict Resolution, etc.
- What is their online presence? Do they have sermons, blogs, resources posted online? Are the links active? Are they on social media? Listen and look at everything they have offered.

## **Ministry Experience:**

- How many and what kind of positions have they held? If there are several, two- or three-year calls, the position matters: as an assistant or curate, this is normal. If they have been an Interim, this too is normal. If they have been PIC or Rector, this is cause for further exploration into the short tenures.

## **Narrative Questions:**

Remember the best predictor of what people have done is the best indicator of what they will do.

- Do you see elements of a STAR: Situation, Task, Action, Results, in their answers that match the STAR elements in your questions?
- Are there stories of what they have experienced?
- Do they respond to the questions with opinions or what they think they might do in the situation?
- Do they show a commitment to ongoing learning?

## **References:**

What do you want to know from references?

## **After reading the entire OTM Profile:**

- Are you drawn to this person in their experience and vision of ministry?
- Did reading the profile spark an appreciation of the candidate?
- Are they a good match for your past?
- Do they match your hopes/discernment for the future?
- Did you see matches in themes and criteria?
- Can you imagine or see yourself working with this person?
- What more do you want to know about them?
- Are there any reservations?

# INTERVIEWING (CONTINUED)

## Mock Interview and Debrief

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ (2 hours)

*Vestry and Consultant*

### Description:

A Zoom interview that will be run exactly like a real interview. The cleric does not receive any questions in advance. OTM profiles are exchanged. It will run as if this is a truly a candidate you are interested in, therefore, no stopping to ask any questions related to what to do next, or how to phrase something, etc. The consultant will be an observer with microphone muted.

### Goals:

- Check the timing of all parts of the interview
- Evaluate the questions for how well they flow, if they need to be reworded to get the information needed, etc.
- Evaluate of the preparedness of the vestry to ask and answer questions
- Provide time for feedback at the conclusion

### Pre-Work:

- Identify a willing clergy person to act as the interviewee. Set a date and time with this “candidate” and the vestry. Ask for their OTM and for permission to share it. Ask them to give an incomplete STAR answer to a question and to be kind and candid with feedback.
- Send the OTM with online links to the vestry to review ahead of time. Ask them to note what is interesting, aligned with their parish, inspiring, etc. and what they would like to know more about.
- Prepare the \$225 honorarium for the assisting cleric to present on the event date.
- Prepare vestry with their roles in the interview
  - **Note takers:** Record question number and answers, not impressions.
  - **Interviewers:** Asks the question, asks for clarification/more depth/expansion if needed
  - **Greeter:** Greets candidate, makes introductions, makes sure candidate is comfortable, has water and provides housekeeping information
  - **Timekeeper:** Monitors the timing of the interview. 10-15 minutes for introductions and warm-up questions. 55-60 minutes for the STAR questions. 20 minutes for the candidate’s questions
  - **Lead Person:**
    - Begins with a welcome and thank you for your interest and scheduling this interview with us.
    - Start with prayer
    - Leads introductions – each person introduces themselves (name, role on vestry, how long they have been in the church, ministry they are involved in.) All should wear nametags or have identifying zoom window labels.
    - Orients the candidate to the meeting structure:
      - This is a STAR interview, duration of the interview, how many questions, and how much time the candidate will have for questions to the vestry,
    - Interview can be up to 90 minutes long.
    - We have some questions for you and you will have the opportunity to ask questions of us.
    - Explain the process of how you will be conducting interviews:
      - All candidates will answer the same questions.
      - Some questions will be specific to the particular resumes. There will be one general and 5-10 STAR questions.
      - Someone will be taking notes.
    - Ask permission if you wish to record it.
    - End the interview (see Closing the Interview below)

# INTERVIEWING (CONTINUED)

## Mock Interview and Debrief (continued)

### Interview preparation and format

#### Questions:

- General warm-up question: The same for each candidate
- Specific question: Is there anything in the resume that you have questions about? Does anything seem odd? Does anything give you pause?

#### The STAR questions:

1. They just roll. No need to say “Now for question number 2.”
2. You are seeking behavior and experience NOT theory and hypotheticals. Be aware if you are being swayed by the language, way of speaking, mannerisms, etc. You want to elicit evidence of behavior and experience.
3. If the candidate is not answering the question with actions or steps taken and results, anyone of the group can prompt with follow up with clarifying behavioral questions.
4. The follow up questions should relate to the criteria that you have defined.

#### Candidate's Q&A:

1. The lead person may want to designate the person to answer each question.
2. Everyone must be very familiar with the congregation's responses to the 5 Big Questions, the OTM questions/answers, the website, and potential questions. Appendix H
3. Financial questions can be addressed by the Vestry.

#### Closing the interview:

1. Thank the candidate for coming to assist the vestry.
2. Let the candidate know where you are in the process, that you are interviewing other candidates. They will be hearing from you in X number of weeks.

#### After the interview:

1. Each person to write down his/her own first impressions using these guiding questions:
  - a. What gave you joy?
  - b. What gave you pause?
2. You can use a criteria rating sheet to score if you'd like.

#### Debrief:

##### Ask the clergy:

- What did it feel like?
- What were the questions like for you?
- What observations do you have?

##### Ask the vestry:

- What were your observations?
  - Did your questions get the desired information?
  - Did the responses or questions challenge, inspire, or convict you?
- Did you feel like your questions allowed you to get a good sense of the priest's skills, abilities and leadership style?

# INTERVIEWING (CONTINUED)

## **Mock Interview and Debrief** (continued)

Offer Consultant's observations:

How did it feel?

- Anxious, not anxious
- Invested, not invested
- Practiced & prepared, not practiced and/or prepared
- Connected, disconnected to the candidate's experience/profile
  - Acknowledged the candidate's profile:
  - Did not acknowledge the candidate's profile:
- Put the candidate at ease?
- Timing: rushed? Inviting? Interrogating?
- Other:

Interactions as a group/team:

- Cohesive, not cohesive
- Lead person's role with handling who answers
- Timekeeper's role
- Knowledge of the church / ability to answer questions
- Follow up questions:

About the questions:

- How they were asked
- STAR format
- How did they sound? Were they clear? Did they get the desired information? Etc.

Note strengths and gain consensus on areas needing improvement

Tell them that this is the fun part! They are going to meet really interesting people and wonderful Christians and the Holy Spirit is going to be present.

# INTERVIEWING (CONTINUED)

## Site Visits of Final Candidates

Once the Wardens have had an introductory conversation with the candidates with two previously selected questions and have answered any questions the candidates may have of them, the vestry comes to consensus on whom it wishes to have a full interview with. The vestry makes plans for the onsite visits. Remember to include travel time and meals for the candidate outside of the interview.

A typical two-day visit includes:

- Meeting with the Bishop
- An opportunity for the candidate to celebrate Holy Eucharist/Morning Prayer and preach
- A tour of the buildings, including the Rectory
- A shortened vestry meeting with a “live” issue
- The structured interview questions with time for the candidate’s questions
- Meeting with the Wardens on the financial package and the current finances
- Tour of the area
- Meals, breaks and social time

If a spouse or family accompanies the candidate, make sure that they are welcomed with hospitality, a tour of the area, time to see the Rectory, and time to meet members of the vestry in a social context.

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

By reviewing the parish position profile, candidates are acquainted generally with the financial terms the parish may offer, but during the final interview stages discussion of the financial package and the financial status of the parish must take place. Review your most recent financials and current income streams, pledging, long term rentals, schools, etc., Candidates coming from outside the diocese should be made aware of the cost of living (especially housing) in your area.

Prior to each visit, vestry members prepare for the interview by reading all materials, listening to online sermons of the candidate, discuss and decide as a group what they need to know more about each candidate and any concerns they have.

## Suggested Schedule:

9-10am	Worship service (Eucharist or Morning Prayer) This is a private service with the vestry.
10-10:30am	Refreshments and tour of the buildings The vestry may take a few minutes to make their own notes about the worship service.
10:30-12:00	Vestry Discussion with a “live” issue exercise The vestry may take time to reflect and discuss. Candidate can have “down time” during Vestry reflection time. Make a comfortable space available for candidate.
12:00-1:00pm	Catered/pre-prepared lunch
1:00-2:30pm	Structured interview with STAR questions
2:30-3:30pm	Discuss the Letter of Agreement and Compensation Plan with the candidate.
3:30-5pm	The candidate may be taken on a tour to explore the neighborhood, schools, etc.



# INTERVIEWING (CONTINUED)

## **Site Visits of Final Candidates** (continued)

As you move through your time with your candidate be aware of and make arrangements for the following:

### **Preparing for Visit with your Candidate**

#### **Instructions Given to the Candidates for Preaching:**

- On the day of your visit we would like you to lead Eucharist/Morning Prayer and preach on the lessons appointed in the Lectionary.
- We will provide the readers and you will be the intercessor.
- Although the vestry will be present we would like you to imagine that you are preaching to the entire congregation at a regular Sunday service.

#### **Instructions Given to the Vestry:**

- Allow yourself to fully enter into the worship service. Following the service, you can make some brief notes on what was valuable before engaging in the interview or the next activity.
- What did you value from the sermon?
- What would have made the sermon more valuable?
- What did you value from the worship?
- What would have made the worship more valuable?

### **Points for Reflection** (These may be adapted to reflect your congregation's needs.)

#### **Sermon**

- Can I hear God speaking to me through this person?
- Would I look forward to hearing this person preach weekly?
- Would I feel inspired by this person's preaching to invite a friend to church, knowing that they would benefit from hearing them?

#### **Worship**

- Rate the worship as soon as the service is completed while the experience is still clear and present in your memory.
- Take stock of your global impression. Is your overall impression positive or negative?
- Would I look forward to weekly worshipping with this person?
- Did I feel the Holy Spirit's presence in the worship?

### **Possible conversation/questions at lunch:**

- Discuss the priest's feeling about the sermon and service.
- Why are they considering leaving their congregation?
- Is there anything that is important to them that you should know?
- Do they have any hobbies or passion projects?
- Do they have any questions about Open Doors New Futures Mission Search discernment?
- Who are their heroes?

# INTERVIEWING (CONTINUED)

## Site Visits of Final Candidates (continued)

### Sample Vestry Discussion with Candidate

#### Instructions Given to the Candidate PRIOR TO the Visit

On the day of your interview with the vestry, you will be asked to lead an hour-long discussion with the vestry members on the course and direction of the congregation's future:

- Example: The vestry acknowledges that the congregation is predominantly older (70% in the over-65 demographic.) The vestry is concerned about maintaining its traditions of worship while at the same time attracting new members, especially younger members and families. For the purposes of the Vestry meeting, please assume that you are the Rector/PIC of the parish, and the Vestry is at a planning a retreat, at which an hour is set aside to discuss the parish assets and dream about possible futures of the parish.

#### Instructions to Vestry Members

Refer back to the instructions for the discussion. The expectation is that the candidate will lead this discussion as though you had an hour to spend discussing the course and direction of the parish's future. In addition to being a "real" participant in the discussion and genuinely sharing your personal thoughts and feelings on the subject, you are also evaluating your experience of being a vestry member with this candidate to discern how you would work with them if they were called as your Rector/PIC. Rather than taking copious notes of your experience and thus distracting yourself from the discussion during the session, use the points for reflection after the discussion to guide your reflections. Remember that the candidate is also evaluating whether they discern the call to come and be your Rector/PIC. Prepare copies of Points for Reflection ahead of time for each vestry member.

#### Points for Reflection

- Did the candidate ask questions of the vestry that clarified the issues? **Y N ?**
- Did the candidate respect differences of opinion? **Y N ?**
- Did the candidate show adequate appreciation for the wide range of emotional issues attached to the issue of maintaining our traditions but also allowing for growth? **Y N ?**
- Did the candidate draw conclusions that you felt accurately reflected your views? **Y N ?**
- Would you feel good about serving on a vestry with this person as your rector? **Y N ?**
- Do you feel that with this person as your Rector/PIC, God will be able to lead you and the vestry into God's mission path for the parish? **Y N ?**
- Was the candidate able to bring the vestry to a place of consensus regarding the future direction of the parish? **Y N ?**

(Note: the consensus may be simply to agree on the issues and a need for further discussion rather than any conclusions. The idea of consensus here is to contrast it with confusion and frustration, which can occur in this type of discussion.)

#### Reasons for "Y", "N" or "?":

At the conclusion of the day, the vestry meets briefly to share first impressions. There is no vote or definitive decisions made at this time. After all the candidates have visited and have been evaluated, schedule a meeting to discern the call.

#### Ground Rules for Finalists' Visits to Parish

- Do remember that this time is a two-way interview. The candidate (and his or her family) is as interested in finding out about you as you are him/her. Include family in any social time.
- Remember to call and confirm 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. Decide who will host candidate's family and shepherd their visit.
- Do allow for some "down time" for the candidate to reflect on his/her experience in your parish.
- Decide in advance which church staff the candidate should meet and be consistent.
- Do take care of all logistics prior to the candidate's arrival. Arrange for their pick-up at the airport, book and pre-pay a hotel room, make arrangements for the family to visit the local school if appropriate, town, and amenities etc., and provide play opportunities for children.

# PHASE 4

## THE CALL

### Discernment Workshop

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ (3 hours)

*Vestry and Consultant*

#### Description:

A retreat for Hearing God's call to ministry using the Heaps of Praise process. Prayer and Bible study are used to tune their hearts to the key of the Holy Spirit and using an Appreciative Inquiry process to discern their election.

#### Goal:

- To discern if there is a call to ministry together and move to an election

#### Agenda:

**Scripture Study:** Scripture study is absolutely vital to the discernment process. For Christians, scripture study is like an orchestra tuning up so that we are in the same key. We tune our hearts to God's heart and hear with God's discernment.

#### Dwelling in the Word

Philippians 4:6-8 NRSV

*Do not worry about anything, but in everything by prayer and supplication with thanksgiving let your requests be made known to God. And the peace of God, which surpasses all understanding, will guard your hearts and your minds in Christ Jesus.*

*Finally beloved, whatever is true, whatever is honorable, whatever is just, whatever is pure, whatever is pleasing, whatever is commendable, if there is any excellence and if there is anything worthy of praise, think about these things.*

- Invite one person to read the scripture aloud. During the reading, listen for the word or phrase that stands out for you. Sit in silence for a minute or two. Go around the circle and share ONLY the word or phrase that stands out for you. (No crosstalk, interruption, or commentary on each other's sharing.)
- Invite a different person to read the scripture again. This time listen for what God is calling for you (each individual) to do on this day. Sit in silence for a minute or two. Go around the circle, each individual speaking for themselves, sharing only what God is calling them (not the group) to do.

#### Prayer before listening

Offer the prayer that the vestry has written and prayed throughout the search, or use prayers found in the BCP:

#### For a Church Convention or Meeting

*Almighty and ever-living God, source of all wisdom and understanding, be present with those who take counsel in {Parish} for the renewal and mission of your Church. Teach us in all things to seek first your honor and glory. Guide us to perceive what is right, and grant us both the courage to pursue it and the grace to accomplish it; through Jesus Christ our Lord. Amen.*

#### For the Election of a Minister

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

# THE CALL (CONTINUED)

## Discernment Workshop (continued)

### **Consensus: Each Candidate is presented separately.**

- Everyone is to cite something positive...
  - Something learned
  - An inspiration
  - A connection
  - A capacity
  - Gifts, etc.
- After all candidates have been presented respond to the following questions:
- Is there enough love, alignment, and Holy Spirit presence to make a creative, transformative life together?
- Prayer – Give thanks for each of the candidates, ask God for clarification in your hearts.
- What is the call in the room?

### **Voicing Reservations**

A candidate's lack may be your invitation to ministry:

- Ask is this a ministry of the laity?
- Where do Vestry members see themselves coming alongside your candidate in ministry?
- Where in the body of Christ at our parish might people or groups come alongside our candidate to meet our ministry needs now and as they emerge?
- Is this a question that further training might address?

### **Election**

After everyone has spoken, the Vestry holds a time of silence, then Wardens call for discernment of candidate. Each Vestry member offers their discerned leader, When the new Clergy leader is identified the Wardens call for a vote.

If the vestry discerns a call:

- Wardens call the Diocesan Bishop to ask permission to make the call
- Wardens call the candidate and begin LOA process
- Call or email the Transition Ministry Team with the following information:
  - "We have agreed to call... starting on first day of \_\_\_\_month. (Clergy must start on the first of the month as benefits can only begin on the first day of the month.)
  - "We have agreed upon a stipend of \_\_\_\_\_ (parish provides stipend amount and Human Resources calculates the benefits package based on the stipend amount and number of people to be insured)
  - "The amount budgeted annually for the "Almoner's Fund"/Rector's Discretionary Fund or the week designated each month of loose plate offering for the Fund is Y."

### **If there is no election**

The wardens are asked to notify the Bishop and the Transition Ministry Team of non-election. A discussion with either or all the Bishop, the Transition Ministry Team and the Consultant will follow and how to proceed will be determined.

# THE CALL (CONTINUED)

The Consultant is not involved in the remainder of the Call Phase of the Clergy Search. This is a summary of the steps that occur during this phase:

- Once the bishop has given consent to the Wardens to elect they may proceed to contact the Transition Minister to craft the Letter of Agreement. Please note that 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 to the Rector/PIC-elect. Announcement of the election may not happen until the Ministry Covenant/LOA has been signed personally by all parties, including the Bishop. (No electronic signatures permitted.)
- Details regarding the Rector/PIC's terms of employment are negotiated with the vestry and/or wardens, and are later spelled out in a formal LOA that is finalized between the parish and the priest who has been called. The LOA is drawn up for signing by the new Rector/PIC and the vestry, and then sent to the Bishop, finally, for review and signature. Its signing completes the process and concludes it formally. Expected turnaround time is 48-72 hours.
- Announcement of the election may not happen until the LOA has been signed by all parties, including the Bishop. Wardens and newly called clergy set a mutually agreed upon announcement date.

## **Review and feedback session as Clergy Search concludes**

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. (Appendix I). A reflection time with the Consultant, the vestry, and the Interim PIC is recommended to celebrate and consolidate learning and what they wish to carry forward, as well as identified areas of further growth. Successful completion of the work of the vestry is also cause for celebration, either in the context of the congregation or simply by the vestry itself.

Distribute the following reflections questions ahead of time. Collect the answers. Read them anonymously and discuss as a group:

- What was supposed to happen? What did happen?
- What worked well? What didn't work?
- What surprised you?
- How might this affect our relationship with our new clergy partner?
- How did it help us prepare for our upcoming Mission Search?
- What advice would you give to improve the process?

Once the new Rector/PIC is in place, the discernment skills that were learned will be used in the next step in discernment when the congregation in concert with their new clergy partner seek to find God's mission for the church in service to its neighbors and members. The second half of Open Doors New Futures (the Mission Search) is the first spiritual journey they will go on together: the search for God's call for their parish and the Mission God is calling them into.

The Mission Search process of Open Doors New Futures commences at a time convenient for the parish in the first year of ministry together.

Many parishes report discovery of exciting new dimensions in their ministry, an increased sense of identity and purpose, newly identified resources in lay leadership, a new recognition of its relationship with the Bishop, the wider church and new partnerships inside their community.



# APPENDIX A

## Ministry Specialties/Themes

In all ministries in the Church, there are broad specialties. Many clergy bring a combination of strengths. This is your opportunity to highlight the areas which are most important to you. These are general categories. Vestry consensus for the top 5 will be used in the OTM.

**Administrative Leader:** The ability to exercise oversight of all aspects of congregational ministry, including programs, organizations, finances, and program.

**Spiritual Formation Leader:** The ability to lead in the identification, design, and implementation of comprehensive programs of Christian understandings and spiritual formation.

**Church Growth Leader:** The ability to reshape, redevelop, or restart existing congregations or to start new ministries with church growth results.

**Community Leader:** The ability to organize community groups and to respond to social issues such as unemployment, housing, crime.

**Ecumenical Leader:** The ability to exercise leadership in interdenominational or interfaith programs or ministries.

**Evangelism Leader:** The ability to share what they love about the Gospel of Jesus Christ and to invite others into Christian fellowship, including the domestic and foreign mission field.

**Mission/Outreach Leader:** The ability to empower and equip persons within the congregation to become aware of and participate in ministry to individual and community concerns beyond the faith community.

**Pastor:** The ability to nurture and equip persons within the congregation for growth within the community of faith, and provide pastoral response at significant life states (death, dying, sickness, birth, crisis, success, including care through home, institutional, or hospital calling)

**Preacher:** The ability to preach effectively by making the Gospel relevant to people's lives.

**Spiritual Guidance:** The ability to lead and encourage others in the formation and development of a deeper spiritual life.

**Staff Leader:** The ability to lead, empower, and supervise others, especially employees and staff.

**Stewardship Leader:** The ability to lead a congregation and individuals in the identification, development, and offering of their gifts and resources.

**Teacher:** The ability to help persons of all ages understand and live the Christian faith.

**Worship Leader:** The ability to plan and conduct liturgical services of corporate worship.

**Youth Minister:** The ability to inspire and incorporate youth into the full life and ministry of the Church and to encourage and equip leaders to work with youth.

## APPENDIX B

### Congregation OTM Portfolio

#### Basic Information

Church Name:

Phone:

Address:

Email:

Position title:

Average Sunday Attendance:

Current status:

# of Weekend Worship Services:

Receiving names until:

# of Weekday Worship Services:

Order of Ministry:

# of other services per month:

#### Compensation, Housing, and Benefits

*Note: New Rector/PIC Full Compensation Package Full Details in LOA*

Current Annual Compensation (includes all the following):

Cash Stipend: \$

Housing/Rectory: \$

Housing supplied for:

SECA: \$

Representing reimbursement of:

Utilities(if separate from housing figure): \$

Compensation available for New position: \$

Negotiable:

## APPENDIX B (CONTINUED)

### Congregation OTM Portfolio

**Pension Plan:** All congregations must be in compliance with CPF requirements.

**Medical and Dental Insurance:** (select one)

Clergy only

Clergy + 1

Full Family

**Continuing Education:**

Time:

Budget:

**Housing Equity Allowance in Budget:**

Yes \$

No

**Travel/Auto Account:**

Yes: \$

No

**Other Professional Account:**

Yes: \$

No

**Vacation Time:**

**Sabbatical Provision:**

### Connections

**Worshipping community's website:**

**Media link:**

**Languages significantly represented:**

### References

**Diocesan Bishop**

**Diocesan Transition Minister:**

**Wardens and other contacts**

## APPENDIX B (CONTINUED)

### Congregation OTM Portfolio

#### Incumbent History & Church Schools

Name:	<input type="text"/>	Date Begun:	<input type="text"/>
Position Title:	<input type="text"/>	Date Ended:	<input type="text"/>
Name:	<input type="text"/>	Date Begun:	<input type="text"/>
Position Title:	<input type="text"/>	Date Ended:	<input type="text"/>
Name:	<input type="text"/>	Date Begun:	<input type="text"/>
Position Title:	<input type="text"/>	Date Ended:	<input type="text"/>

#### Church School:

# of Teachers/Leaders:

# of Students:

#### Day School:

# of Teachers:

# of Students:

Total Staff:

## APPENDIX B (CONTINUED)

### Congregation OTM Portfolio

#### Narrative

*In our baptism we promise to proclaim by word and example the Good News of God in Christ, seeking and serving Christ in all persons. You are invited here to reflect on your ministry by responding to the following questions (**max 250 words each.**) You may answer in multiple languages, if appropriate. When completed and reviewed by Transition Ministry Team, send to Transition Office who will upload to OTM site.*

1. Describe a moment in your worshipping community's recent ministry which you recognized as one of success and fulfillment.
2. How are you preparing yourselves for the Church of the future?
3. Please provide 4–6 words (separated by commas) describing the gifts and skills essential to the future leaders of your worshipping community.
4. Describe your liturgical style and practice. If your community provides more than one type of worship service please describe all.
5. How do you practice incorporating others into ministry?
6. As a worshipping community, how do you care for your spiritual, emotional, and physical wellbeing?
7. How do you engage in pastoral care for those beyond your worshipping community?
8. Describe your worshipping community's involvement in either the wider Church or geographical region.
9. Tell about a ministry that your worshipping community has initiated in the past five years. Who can be contacted about this?
10. What is your practice of stewardship and how does it shape the life of your worshipping community?
11. What is your worshipping community's experience of conflict and how have you addressed it?
12. What is your experience leading/addressing change in the church? When has it gone well? When has it gone poorly? And what did you learn?

# APPENDIX C

## Transition / Interim Communications

Timely and informative communications throughout the interim period builds trust and ownership for all involved. The goal is open, thorough, and regular communication. Experience suggests the healthiest standard is “full disclosure, no surprises.” Another way to think about it is that there are no secrets in the process. However, maintaining confidentiality regarding the identity of candidates allows clergy to safely explore new calls so it is the one exception to the full transparency goal.

**Confidentiality:** In order to protect the confidentiality of clergy interested in exploring whether they are a match, everyone involved in the search process should maintain strict confidentiality regarding specific individuals during and following the process. A break in the confidentiality of privileged information can be seriously damaging not only to a candidate and the candidate’s ministry, but also to the congregation and vestry.

**Communications with the Congregation:** Redundancy is key, with special mailings to the parish, weekly announcements at worship by the wardens or vestry members, regular articles in worship leaflets, information on the website, and the parish newsletter are being essential to a faithful and successful process.

**Communications with the Bishop:** The Bishop is responsible for approving a final call so should be kept informed of progress in the transition process. The responsibility for this lies with the Wardens and is exercised through the Bishop’s Office. The Consultant is also a regular part of this communication chain. It is especially important to keep the Bishop’s Office posted regarding the status of Diocese of Long Island clergy in your process.

**Communications with Candidates:** It is critical to maintain regular communication with each priest involved in your search, assuring that you keep them well informed of the status of the search process and clear about their own status. It is not uncommon for search processes to fail because of poor communication with candidates.



# APPENDIX D

## Communicating with Clergy Applicants

Throughout this process you will need to have careful, confidential, and pastoral communications with all clergy applicants. How you communicate with clergy matters. Timely, professional, and pastoral communications will both help move your process along and also communicate to the clergy your own care for them in this process. Poor communications will likely erode your process.

### Typical Communications in the Clergy Search Process

- Initial email stating that the OTM and letter of interest have been received
  - i.e. Dear Mother/Father...We wanted to take a moment to let you know that we have received your OTM materials. We are still in the process of receiving names. However, you should expect to hear from us with more information within a month's time. In the meantime, please pray for us as we enter into a process that will result in the call of a new Rector/PIC for St. Swithin's. You can be assured of our prayers for you as you discern your next steps in ministry.
- Letter stating that you would like to get to know them better
  - i.e. Dear Fr./Mother...We have enjoyed reading your OTM Portfolio and believe you might have the gifts and skills for ministry needed for the life and ministry of St. Swithin's at this time. We would like you to get to know us better and would like to get to know you better...
- As discernment progresses and candidates are released, a letter stating that should be sent.
  - i.e. Dear Fr. /Mother...Thank you for taking the time to enter into the search process at St. Swithin's. After thoughtfully reviewing your materials in relationship to our parish OTM and profile, we have decided to not have you continue on with us further. We wish you every blessing and pray God's strength and encouragement be with you as you discern your next steps in ministry.
- As soon as possible, contact the semi-finalists to schedule the online introductory meetings with the Wardens.
- Contact the semi-finalists to tell them that their name will be moving forward for an in-person interview and mutual discernment.
- After the online introductory meeting, contact the semi-finalists who will not be moving forward for the position. See previous communication sample.
- Contact the finalists to set up meetings with the vestry and Bishop. These are handled by phone.
- Contact the finalists who are no longer being considered. These must be handled by phone and should be made in a timely manner. Remember, these people have become very invested in this process. You have a relationship with them now.

# APPENDIX E

## Forbidden Questions

Subject	You Cannot Ask	Where info will be available
Age	How old are you?	This is forbidden in the secular world, and there a debate about whether it is legal in the Church. Do not ask, but you can ask how long the candidate would anticipate staying if called. Do not assume that older equals “out of gas.”
Birthplace	Where were you born?	If hired, provide employment eligibility verification (I-9 Form)
Residence	Do you rent or own?	Will know the address from the OTM Portfolio.
Race/Color	There are no acceptable questions.	Candidate will self-disclose at appropriate times if they deem necessary.
Sex (gender)	There are no acceptable questions. <b>You may NOT ask a priest whether s/he intends to marry or have a family, etc.</b>	Candidate will self-disclose at appropriate times if they deem necessary.
Sexual Orientation	There are no acceptable question.	Candidate will self-disclose at appropriate times if they deem necessary.
Citizenship	Are you eligible to work in the United States?	No candidates are proposed that are not either citizens or in a diocesan-sponsored immigration process.
National Origin/Ancestry	You cannot ask about national origin.	Fluency in language is available on the OTM. You may ask about the applicant’s fluency in the language relevant to the position.
Arrests/Convictions	Have you ever been arrested?	We will run a criminal background check. Will we find anything we should know about? (We will run a criminal background check, but usually only on the finalist.)
Marital/Family Status	Are you married? Do you intend to get married?	You will know from the OTM Portfolio or candidate will self-disclose if appropriate.
Military Record	Have you served in the military?	Candidate will self-disclose if appropriate.

# APPENDIX F

## Example for Rating Skills and Abilities

**Instructions:** Rate the following responses to the question about team ministry. Work individually first and then come to consensus on the ratings. The ratings are provided on the following page.

**Question:** St. Paul's has many different ministries led by a large team of active parishioners and community volunteers. Describe your experience of developing and leading teams of people to carry out the work of ministry.

**Theme:** Leadership/Enabler. Respondent needs to indicate successful experience training and enabling parishioners to participate in ministries designed to strengthen congregational life.

**Criterion:** Leadership development, delegation, and involving others.

1	2	3	4	5
<b>Poor:</b> No team leading experience, regardless of reason <b>Weak:</b> Negative experience or gives theory		<b>Acceptable:</b> Minimal experience, no outcomes, may stress theory	<b>Good:</b> Significant experience but not outcomes <b>Excellent:</b> Considerable experience with positive outcomes	

A. Team ministry is very important to me and is part of the heritage of all Christian people. At the great commission, Jesus sent all the people out to make disciples, not just a select few. One of the main reasons the church is losing members is because too few people are doing all the work. Only as each one of us takes up our cross and follows Jesus will we be the dynamic Body of Christ proclaiming the Good News of the Kingdom of God.

B. I've endeavored to involve others in my ministry by calling on lay people to assist me when I needed help.

C. As the Associate Rector with responsibility for pastoral care and evangelism I have established and provided ongoing training and support for a Pastoral Care team to help minister to the elderly, and an Evangelism team to reach out to newcomers to the church and seekers in the community.

D. My current ministry is amongst the scattered tribes of Outer Mongolia and there is little opportunity to develop team ministry.

E. Here at St. James' I have established teams to carry out most of the significant ministries, such as youth work, evangelism, pastoral care, outreach, and spiritual formation. These teams have been successful in establishing a wide range of opportunities for lay ministry and this has enabled our parish to reach out to a broad cross-section of our community.

F. I tried to start a team of lay visitors but the people here are really apathetic and it didn't work.

G. My present ministry is a solitary chaplaincy position. However, I am strongly committed to the concept of team ministry and in anticipation of moving to a parish setting I have participated in several team-building and leadership training workshops.

H. I currently have a ministry team of 2 full-time priests, a part-time youth worker, and a secretary to assist in the parish ministry. Our shared ministry has been successful in ministering to the needs of shut-ins, young families and the youth in our parish. We have also begun a ministry to gangs.

I. If I am selected as your new Rector I will actively foster the development of your current ministries and prayerfully encourage the development of new team ministries as we seek to follow Christ and respond to the needs of the community.

## APPENDIX F (CONTINUED)

### Example for Rating Skills and Abilities

**Assess what you and others can observe and not what you think they mean to say.**

#### **Rating Example Scoring:**

<b>Candidate</b>	<b>Score</b>	<b>Reason</b>
A	2	Respondent gives a theoretical answer without any indication of experience in establishing or maintaining a team ministry.
B	2	Respondent indicates that lay ministry is a last resort. There is little indication of experience in establishing or maintaining a team ministry.
C	4	Respondent indicates that within the bounds of their responsibility they have established and maintained 2 team ministries. No mention of outcome is given.
D	1	Respondent has no experience of team ministry.
E	5	Respondent indicates considerable experience establishing and maintaining a diverse and successful team ministry.
F	1	Respondent was unable to sustain a ministry and blamed others for its failure.
G	3	Respondent has not experience but does indicate a commitment to the concept by attending training workshops.
H	2	Respondent views ministry as the work of professionals and although they indicate leadership experience, there is no indication of developing leadership amongst the parishioners.
I	2	Respondent gives no indication of leadership experience. Instead, they talk theoretically about what they will do in the future.

This rating procedure is the basis by which all skills and abilities are assessed. It is used for assessing written responses, the responses from a structured oral interview, the presentation of a sermon, the celebration of a Eucharist or other service, or any other ability that is considered to be necessary or important by the parish.



# APPENDIX G

## Anti-Bias Compensation Slides

### Compensation by Gender and Race/Ethnicity

Gender	Race/Ethnicity	Median	Number	% of Total
Female	American Indian/Alaska Native	NR	3	0.13%
	Asian	\$90,000	15	0.66%
	Black/African American	\$95,000	49	2.15%
	Hispanic/Latino	\$68,328	17	0.75%
	White	\$81,576	881	38.69%
	Multiple Races	\$83,952	21	0.92%
	Other	NR	3	0.13%
Male	American Indian/Alaska Native	\$76,875	7	0.31%
	Asian	\$84,890	25	1.10%
	Black/African American	\$99,679	66	2.90%
	Hawaiian/Pacific Islander	NR	2	0.09%
	Hispanic/Latino	\$89,449	49	2.15%
	White	\$91,502	1,105	48.53%
	Multiple Races	\$97,760	33	1.45%
All	Other	NR	1	0.04%
	American Indian/Alaska Native	\$97,200	9	0.41%
	Asian	\$87,197	39	1.77%
	Black/African American	\$99,679	110	4.99%
	Hawaiian/Pacific Islander	NR	2	0.09%
	Hispanic/Latino	\$88,187	63	2.86%
	White	\$88,143	1,926	87.35%
	Multiple Races	\$90,143	52	2.36%
	Other	NR	4	0.18%

### Compensation by Gender and Age

Gender	Cleric Age	Median	Number	% of Total
Female	34 and younger	\$75,000	81	0.8%
	35 to 44	\$78,910	333	5.8%
	45 to 54	\$85,000	460	8.4%
	55 to 64	\$83,411	666	13.4%
	65 to 72	\$71,000	437	8.5%
Male	34 and younger	\$70,001	149	1.9%
	35 to 44	\$87,530	598	11.8%
	45 to 54	\$95,363	768	14.8%
	55 to 64	\$97,405	955	19.0%
	65 to 72	\$83,256	500	10.0%
All	34 and younger	\$72,214	230	3.5%
	35 to 44	\$83,967	931	18.9%
	45 to 54	\$90,052	1228	24.6%
	55 to 64	\$90,996	1621	33.2%
	65 to 72	\$76,855	937	19.8%

# APPENDIX H

## Candidate Questions to the Vestry

The following are questions Clergy candidates might ask a Vestry during an interview session:

1. What are the strengths of your Parish? How do you promote them?
2. What are the weaknesses of your Parish? How do you expect your new Rector /PIC to address them?
3. What needs the Rector/PIC immediate attention? What about the first six months?
4. Describe your staff: strengths, weaknesses; how do they work together?
5. Tell me about your Spiritual Formation programs: children, adults, curriculum, attendance, and recruitment.
6. What kind of emphasis is put on outreach? How are you involved in your community and beyond?
7. Describe your annual stewardship program; what part has the Rector/PIC played?
8. Tell me about your programs for young adults.
9. What is the Parish policy on the use of alcohol?
10. What were the strengths and weaknesses of the previous Rector/PIC? Why have your previous clergy left?
11. How does your Parish have fun together?
12. Tell me about music in your congregation.
13. What are the expectations of the Rector/PIC spouse? How was the previous spouse involved in the programs of the church?
15. Are there any difficulties or agendas in the congregation that I need to know about?
16. What is the relationship of your Parish to the Diocese? What is the record of financial support?
17. What are your long-range plans and goals? (This is an opportune time to speak about Open Doors New Futures.)
18. What is an example of an important ministry or activity that fulfills your Parish's unique mission?
19. How does your Parish care pastorally for the clergy and their families?
20. Give me an example of a major issue in the life of your Parish; how did you and your Rector handle it?



# APPENDIX I

## Tasks at the conclusion of the Clergy Search

As a general rule, materials and documents left over from the search should be disposed of in an orderly fashion since much of it is confidential in nature and inappropriate for parish archives. Here are some examples:

- Evaluations, lists, notes, reports, and profiles of all candidates
- Resumes, OTM profiles, sermons, photographs
- Correspondence of any nature with candidates or with the Office of the Bishop
- Reports, recommendations, and meeting minutes concerning the candidates
- Visitation and hospitality arrangements for candidates
- Documents concerning candidate compensation and benefits
- Background document information and investigative reports

Specific work done with the Interim Priest, if not of a confidential nature might be kept, particularly if it provides insight into issues of which the new rector/PIC ought to be made aware. Again, most records and documents specifically related to the selection/appointment of the Interim should be destroyed.

Directives for the vestry in the clergy search process, search budget, or expectations may be retained as useful information for future clergy or staff searches.

Liturgical celebrations and planning documents linked to the search (e.g., leave-taking service [rector and interim], discernment retreats, and welcoming/installation of new rector/PIC) should be forwarded to the parish archives.

A meeting should be scheduled prior to the arrival of the new clergy partner with the Consultant and Vestry to review the Clergy Search process, what worked, what needs fine tuning, and preview of Mission Search as the journey continues.

# ADDITIONAL RESOURCES

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1. *Grounded in God: Listening Hearts Discernment for Group Deliberations* by Suzanne G. Farnham, Stephanie A. Hull, R. Taylor McLean: [dioceseli.org/groundedingod](https://dioceseli.org/groundedingod)
2. *How to Lead When You Don't Know Where You're Going: Leading in a Liminal Season* by Susan Beaumont: [dioceseli.org/leading](https://dioceseli.org/leading)
3. [STAR Interview Skills Training](#) by Mary MacGregor
4. *Holy Currencies* by The Rev. Eric Law
5. [Anti-Bias Training](#)
6. Blind OTMs (available from DTM or Transition Consultant)
7. *How to Try*, The Rev. Lorenzo Lebrija
8. [Beloved Community Storytelling](#)
9. [Open Doors New Futures Guiding Principles PowerPoint](#)
10. Spiritual Gifts Quiz: [spiritualgiftquiz.org](https://spiritualgiftquiz.org)
11. [Spiritual Gifts PowerPoint](#)

Access these  
resources on our  
website



Handwriting practice lines consisting of 20 horizontal dotted lines.

# OPEN DOORS NEW FUTURES:

## What does God want to do here?



**OPEN DOORS NEW FUTURES Clergy Search**, has been developed from the strong work of the Transition Consultants and Interim Clergy of the Diocese of Long Island, who have shaped this process over a three-year period, and we are deeply indebted to them. The work and thought of Susan Beaumont in *How to Lead When You Don't Know Where You're Going: Leading in a Liminal Time*, the work of The Rev. Eric Law in *Holy Currencies* and Ms. Suzanne G. Farnham et al in *Grounded in God: Listening Hearts Discernment for Group Deliberations* have been foundational to the shape and philosophy of Open Doors New Futures.

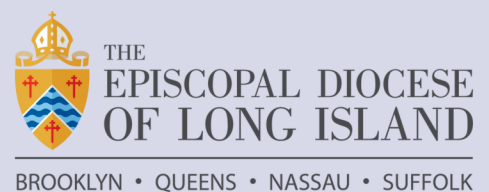
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**Published April 2025**