

OPEN DOORS NEW FUTURES

CLERGY SEARCH

VESTRY 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.

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|---|---|
| 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

*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

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

Matthew 6:10

Congratulations! You are in transition! In a changing time for churches, it may seem a time for anxiety but looking at church history and the story of scripture, the in between times are places where God does wonderful things. We want to assure you that God is present as ever, and your Diocesan Bishop is with you on this journey, providing you the support, encouragement and guidance you need at this time. The Diocesan Transition Minister (DTM) and Transition Ministry Team (TMT) serve as the Bishop's liaison to your congregation and pledges to provide you the consultation and resources needed to discern your new clergy partner and transition successfully into the next stage of your congregation's life. Communication between the congregation, clergy, and the Bishop's Office is an essential ingredient in a successful search.

This Handbook is intended to be a roadmap for the Clergy Search section, first of the two-part transition process of Open Doors New Futures. The Clergy Search is carried out by the vestry or Bishop's Committee, with contribution from the congregation and a consultant. The Mission Search is carried out by the whole congregation with their new clergy partner and consultant. Formerly churches spent 12 - 18 months in self-study and visioning for its future and sought a clergy person to match. Standing back and reviewing the process has led us to reverse the structure of the search. We look for a snapshot of the parish as it is today for the profile, conduct the search, and reserve the vision for after the new clergy partner is called. The search team is moved from the search for a new clergy partner to the search for mission team that facilitates the search for God's call to new mission. While the whole process still takes approximately 18- 24 months, half of this time is with your new clergy partner. The time between clergy has been reduced significantly.

The search for mission replaces the old self-study and now incorporates all the gifts, insights and capacities of your new clergy partner. It is an opportunity for onboarding and bonding with your new clergy partner, experiencing their spiritual leadership and the inspiration of God's leading together as a congregation. You will learn and imagine right beside them, building your discernment together. There are separate handbooks for the Mission Search that can be found on the [Diocesan website](#).

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*. Many spiritual aspects in the search for a clergy partner and mission and ministry of the church in Open Doors New Futures are drawn this work. Liminal means "on the doorstep" in Latin. When we know that how we have lived as church in the past has waning effect today, and we are unsure of what our future needs from us, we are liminal, between the past and the future. While we may feel uncertain or anxious, it is also a time of great possibilities. Beaumont identifies attending to the soul of an institution as the heart of finding the local parish institution's new chapter of life. It does not rely on recycling old strategies but building on the best in the congregation's story where God's presence has been powerful and creative, and adapting it to respond to what God reveals in the neighborhoods and communities of the parish today. Engaging congregational soul work enables the congregation to engage in God's vision of where we are going. No two churches will hear exactly the same thing, God is always site specific and always generous, supplying what we need to do the work God calls us to.

INTRODUCTION (CONTINUED)

The Clergy Search part of the Open Doors New Futures process focuses primarily on learning individual and community discernment. It is the foundation of the work to come. Discernment deepens our awareness of God's leading and deepens our awareness of God in one another's lives. Transformational times and the work of discernment asks us to open hearts and minds to God and be willing to move from:

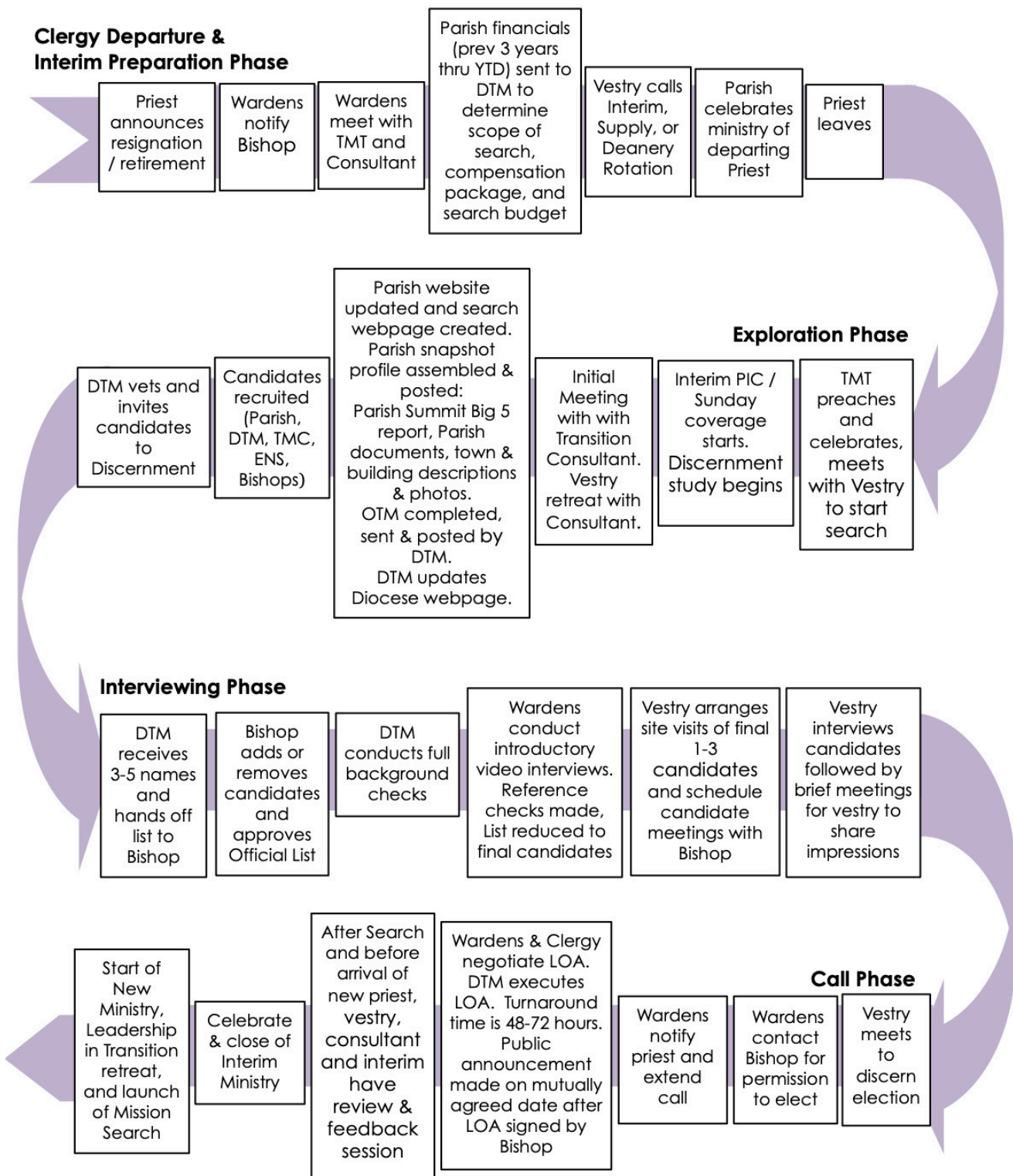
- from knowing to unknowing,
- from advocating to attending,
- from striving to surrender.

Learning and practicing discernment prayer will be a focus of the work of your Interim time and prepares the vestry to discern your clergy call. Widening the practice of discernment in the congregation will support the later work of discerning mission.

There is always a measure of uncertainty when a congregation is in transition. However, be assured, this is a time of great grace and transformation. Parish communities in transition often discover that they have a capacity for faithfulness, creativity, humor, discernment, and spiritual maturity that they did not know before. Our hope and prayer is that you will discover new joys and opportunities to be light and salt for the world as you embark on this journey.

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. As the leadership, it is your job to communicate to the congregation every step of this journey.

OPEN DOORS NEW FUTURES CLERGY SEARCH



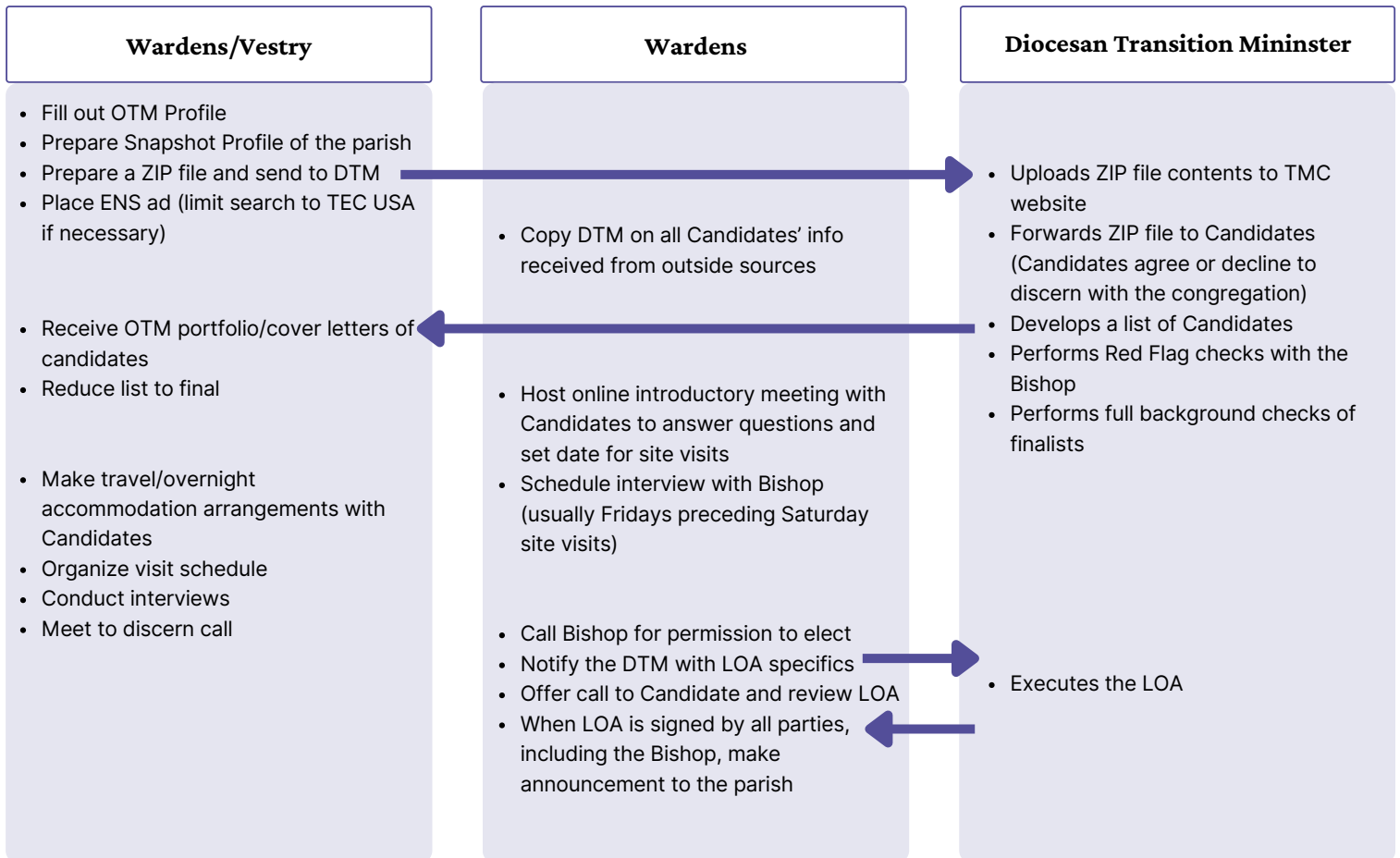
TMT: Transition Ministry Team
 DTM: Diocesan Transition point person
 OTM: Office of Transition Ministry

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

Peace I leave with you; my peace I give to you. Not as the world gives do I give to you. Let not your hearts be troubled, neither let them be afraid.

John 14:27

Fear not, for I am with you; be not dismayed, for I am your God; I will strengthen you, I will help you, I will uphold you with my righteous right hand.

Isaiah 41:10

Priest Announces Resignation/Retirement

It is important that the Bishop's Office be a part of the transition process from the very beginning. The transition process begins when the departing priest meets with the Bishop and they determine together when the announcement to the Vestry and congregation will be made. Generally, a 60-days notice should be given. In the case of a retirement, 4-6 months is appropriate in order to encourage a thoughtful transition. Once contact has been made with the Bishop's Office, the priest must immediately notify the wardens and the entire vestry soon after.

The departing priest must make an appointment to meet with the bishop to discuss the state of the congregation, as well as their options in the upcoming transition period. A Clergy Exit Interview, to be shared with the Bishop, Transition Minister, and his or her successors, is completed. See Appendix A.

The departing priest will put together a file of information to pass on necessary information and tasks. Many tasks may be shared with paid staff and Wardens/Vestry. Some actions are directed solely to the priest. The list of necessary information and actions is found here: [Leave-taking essentials](#)

Wardens Notify the Bishop

The Wardens are required canonically to contact the Bishop to request beginning the transition process. Clergy and wardens jointly determine how and when the congregation will be informed of the priest's departure. Together they announce to the parish, generally in the form of a letter and a personal announcement in church.

CLERGY DEPARTURE AND INTERIM PREPARATION (continued)

Wardens Meet with the Transition Minister and Consultant

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.

Transition Consultant Referred

A consultant/facilitator trained in the Open Doors New Futures Clergy and Mission search process is recommended to any parish in transition. The Transition Consultant is engaged by the vestry and works with the Transition Ministry Team. The Consultant works with the vestry, helping them to plan and design the congregational meeting, create the profile, develop questions, and prepare for the interview and discernment process. The Consultant serves as the link with the Bishop's Office in providing resources and guidance to the congregation during the clergy search process and works collaboratively with the Interim. In the Open Doors New Futures Mission Search process, the consultant works collaboratively with the newly called clergy partner and the Mission Search team and vestry. E-mail communications concerning the search process between the Interim and the Transition Consultant should be cc'd to the Transition Officer in the Bishop's Office, and the Interim Clergy and Consultant should determine a system for being in touch. The greater the communication among all parties, the greater the opportunity for a smooth transition period.

Establishing Financial Guidelines of the Clergy Search

At the beginning of the Clergy Search, the Wardens must submit a financial statement of the previous three years through the current year to date to the Transition Minister and the Office of Finance. See Appendix B.

Determining the scope of the search

It is the responsibility of the congregation to demonstrate that it is financially able to sustain itself and provide the requisite compensation and benefits for clergy for at least a three-year period following the calling of the new clergy. The financial health of the congregation determines the scope of the search. 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.

A congregation, therefore, must meet the following requirements in order to undertake discernment for a new rector:

- Demonstrated ability to pay the full compensation and benefits cost of the Rector/PIC for the next three years without substantial invasion of investments/endowments
- Past and prior year audits performed and filed with the Diocese
- Timely and complete submission of congregation's parochial report
- Submission of diocesan pledge card and current and regular payment of diocesan pledge of 10%
- Congregation has no debt or has a viable debt repayment plan

CLERGY DEPARTURE AND INTERIM PREPARATION (continued)

Determining a 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
- The compensation packages of rectors in similar parishes
- The nature and scale of the work expectations of the rector
- 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. If the cost of a Consultant will place an undue burden on the congregation, the Senior Warden is encouraged to contact the Transition Officer. See Appendix C.

Clergy Leadership During the Transition: Vestry Calls Interim, Supply, or Deanery Rotation

The period immediately following the announcement of the clergy's departure can be a time of anxiety for a congregation. Strong communication and clear systems for working together generally reduces anxiety and increases an effective transition. There is much speculation about "What will happen next?" and "How and when will we get our next priest?" As the canonical leadership during the interim period, the wardens and the vestry will be tasked with the significant responsibility of providing a clergy presence and of maintaining and supporting programs and ministry, a considerable undertaking. It is for that reason that communicating transition can be an excellent pastoral resource for the congregation. The function of communication is to point the congregation forward in order to embrace a new vision and possibilities for itself.

In the days immediately following the departure of a priest, the wardens may need to arrange for supply clergy. A list of supply clergy may be obtained from the Bishop's Office. If no supply or Interim is available, the Transition Minister will contact the Dean of the Deanery and the congregation may have a rotation of clergy within their deanery as presiders during their search. In case of pastoral need during the rotation period, the Dean of the Deanery should be contacted.

It is important to be as flexible as possible in this instance as clergy are covering their own congregations. A change in service time may be necessary to obtain Eucharistic coverage. In the case of Deanery rotation, the congregation does Morning Prayer twice a month and has eucharist twice a month, depending on availability of the area clergy. Please note that under no circumstances may a Deacon or lay minister offer the sacrament from the reserve.

Pursuant to the canons of the National Church, the Bishop, in conversation with the vestry, appoints a priest to provide clerical leadership. Depending on the particular needs and circumstances of the congregation, the Bishop will appoint either an Interim Priest trained in interim ministry or a Priest-in-Charge (PIC).

CLERGY DEPARTURE AND INTERIM PREPARATION (continued)

The Interim is a guide to the vestry and parish during the transition encouraging momentum and helping to prepare the soil for arrival of the new permanent Rector/PIC. See Appendix D and Appendix P. The interim is generally approved by the vestry and appointed by the Bishop. The interim remains on for approximately 12-18 months, and only under very isolated incidences and only with the agreement of the Bishop, may the interim be considered a candidate for rector.

In some circumstances, the Bishop may appoint a PIC or Vicar to serve the parish for an extended period of time. This generally happens when the parish is under some sort of strain. A PIC/Vicar may be the appropriate decision when:

- there has been a long-term rector
- the rector has left after a very short tenure
- the rector and vestry have been canonically separated
- there are meaningful financial difficulties
- there is extreme unresolved conflict in the congregation
- there are urgent and intractable facility challenges

In this case, the PIC may stand for rector after 2 years. The PIC has all the authority of Rector except tenure.

A Parish Search Prayer may be developed for the whole congregation that invites a spirit of thoughtfulness, intercession, and faith-building. Any of the collects in this document may also be used. Many vestries ask that the Interim or one vestry member act as their chaplain to keep them spiritually grounded by beginning and ending meetings with prayer and encouraging the use of the Parish Search Prayer by the congregation throughout the transition period. The study and practice of discernment prayer used in the book *Grounded in God: Listening Hearts Discernment for Group Deliberations* will provide practice as you move towards discernment of your clergy partner.

The commissioning of the vestry for the search process may take place during Sunday worship and signals liturgically the significant responsibility and role that the vestry members are assuming in the life of the congregation. See Appendix E.

CLERGY DEPARTURE AND INTERIM PREPARATION (continued)

Parish Celebrates Ministry of Departing Priest

The vestry, congregation, and clergy together should plan and carry out the farewell and celebration of the priest's ministry, generally before any formal work on the search begins. Whether the priest is leaving because of retirement, a call to another parish, or even because of differences with the parish, the elements of the separation process remain the same. Much of the energy of the parish during this time should be devoted to saying good-bye in the best possible way.

Clergy and wardens should be mindful that parishioners are often expressing grief and anxiety at the loss of their priest. Therefore, particular attention should be paid to openly discussing appropriate boundaries for pastoral relationships with the congregation before the clergy departs. Resources for ending a pastoral relationship are found in Appendix F, Appendix G and Appendix Q.

Priest Leaves: Boundaries for departing Clergy

Appropriate Pastoral Boundaries must be set when a cleric departs a congregation. It is the Bishop's expectation that that once a cleric leaves a congregation, he or she will bring closure to pastoral relationships with members of that congregation. The health of the congregation is dependent upon how well the transition is managed. Former parishioners should understand from the cleric in a positive and affirming way that it is not appropriate to continue a pastoral relationship. This includes phone calls, social media, and visits to the new parish.

The Bishop expects that the cleric will accept no further requests from members and former members of the congregation to provide pastoral services at weddings, funerals, baptisms, or any other occasion of public worship for at least one year. After one year, clergy may accept invitations from the interim or rector, but may not solicit such invitations or accept them from former parishioners.

When a former parishioner reaches out to a departed cleric for pastoral care or to officiate at a sacramental liturgy, the cleric is obligated to pastorally redirect the former parishioner to their current interim or rector. At the rector's invitation alone may the former cleric officiate at pastoral services in his or her former congregation.

There are many details to wrap up when cleric departs a congregation. It is absolutely essential that the departing cleric transfer all passwords, codes, and signature cards to the Wardens. Leave-taking Essentials has been provided for clergy and will aid a thorough, professional, and pastoral ending to the pastoral relationship.

PHASE 2

EXPLORATION

Rejoice in the Lord always; again I will say, Rejoice. Let your gentleness be known to everyone. The Lord is near. 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.

Philippians 4:6-7

Almighty and gracious God, be with us and guide us;
open our minds and teach us; open our hearts and surround us with your love, make us to feel your presence and follow your leading.

Imbue us with wisdom and awareness of your vision as we seek a new rector and spiritual leader. Grant us an adventurous spirit, willing to attempt new tasks and face new ways, ever mindful of the need to follow your Holy Spirit and not our own fancies and desires.

Grant continued grace and commitment to those who have been called to serve in the clergy search that they may become faithful companions to each other, as the Vestry, for this Parish.

We ask all this through Jesus Christ, our Lord, who lives and reigns with you and the Holy Spirit, one God, now and forever.

Diocesan Transition Minister meets with the Vestry

The Diocesan Transition Minister will celebrate and preach at a liturgy very shortly following the departure of the former cleric. A meeting following the liturgy (or at another time, as appropriate) with the vestry will focus on settling into the transition and any particular interim work (i.e. improvements to the rectory, website, congregational/leadership development, and the nature and timeline of the Clergy Search process.) It is recommended that the vestry do a comprehensive review of finances including a review of operating expenses and any capital needs.

It is recommended that the vestry conduct a comprehensive audit of all the property. This would include a careful review of the buildings with Episcopal Real Estate of Long Island (ERELI) and the development of a report stating any needed improvements to be shared with candidates during site interviews. A record of completed improvements is very helpful to an incoming clergy partner, (i.e. furnace installed in rectory, 2020; roof on rectory needs replacement ASAP). If the parish has a rectory, there should be an honest assessment as to the condition of the rectory, with a plan for repairs and cleaning prior to the arrival of the new clergy partner.

EXPLORATION (CONTINUED)

Interim PIC / Sunday Coverage starts and Discernment Study Begins

Calling a new clergy partner is a process of mutual discernment, engaged in by the congregation and the clergy candidates, in partnership with the Bishop and the Bishop's Office. This exciting time of seeking the best clergy match (not the best priest) for a congregation should be carried out prayerfully and with faith, the capacity to take a holy risk in order to follow God. Each step of the discernment requires a commitment of time and resources by God's people deeply rooted in prayer. A study of the book *Grounded in God: Listening Heart Discernment for Group Deliberations* will be central to the work of the interim period and Clergy Search and prepares the congregation for the Open Doors New Futures Mission Search that will follow the arrival of the new clergy partner. Discernment study is the primary task of the congregation in the interim period. The interim period is also a time to address the following six tasks for Congregational Development:

- the work of teaching, preaching, liturgy, pastoring, and vestry leadership development.
- conducting a congregational assessment.
- helping the congregation understand the "seismic shifts" in American culture: "Why do we do what worked before and experience diminishing results?"
- reviewing and updating parish records and business practices
- practicing the gift of St. Barnabas, "Son of encouragement."
- addressing spiritual formation needs, especially when church business is conducted as if God is not present

Initial Vestry Meeting with the Transition Consultant

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. (Appendix H)

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

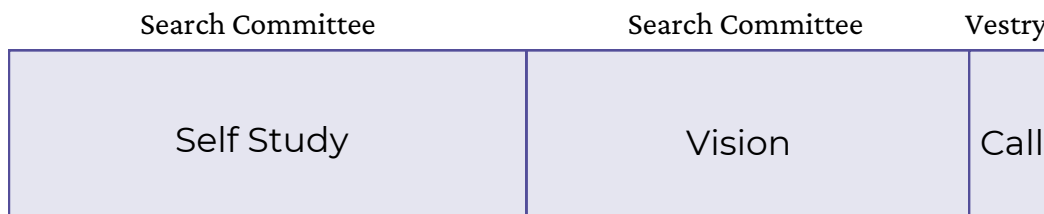
EXPLORATION (CONTINUED)

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:

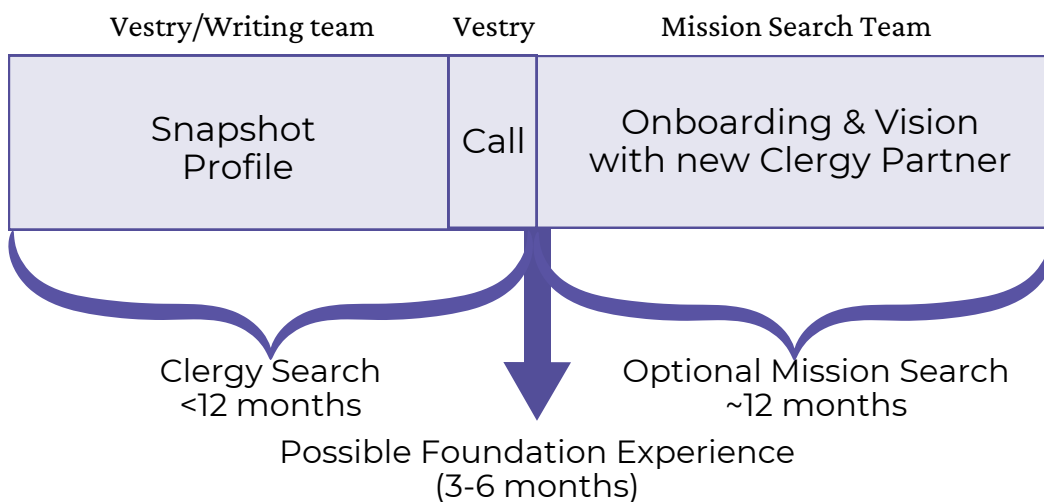
- There are fewer clergy searching and fewer clergy profiles to read through.
- Congregations frequently do not have the reserves, in people or finances, for a long interim period.

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)



The Search Process timeline today: Open Doors New Futures



EXPLORATION (CONTINUED)

Vestry Retreat with the Transition Consultant

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: discernment prayer and scripture study. 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. Any additional members of the Writing team are also asked to participate in the retreat.

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

Creating a Parish Profile (a snapshot of present life)

Parish Summit: The 5 Big Questions

The Consultant will facilitate a parish wide event, usually held on a Sunday after 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 optional Open Doors New Futures Mission Search

Preparing Your 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 webpages may be found on the Episcopal News Service Jobs & Calls page.

EXPLORATION (CONTINUED)

Creating a Parish Profile (a snapshot of present life) (continued)

Preparing Your 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 and the optional 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 Things 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 H
- The OTM narrative: The writing team creates the final draft of the OTM parish profile. Appendix H. 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
- Morale
- Leadership
- Conflict Management
- Spiritual Vitality
- Readiness for Ministry
- Engagement in Education
- 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)

Creating a Parish Profile (a snapshot of present life) (continued)

Preparing Your 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. See Appendix H.

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/

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.

EXPLORATION (CONTINUED)

Finding Candidates (continued)

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

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 I

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.

Diocesan Requirements for Conducting a Clergy Search

In the Episcopal Church, clergy may be placed only with the approval of the Bishop. The Bishop determines eligibility for transition ministry in the Diocese of Long Island. It is based upon the clergy's qualifications. In certain settings, the associate or curate may function as an Interim priest-in-charge, they will depart at the conclusion of the Clergy Search.

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.

The Bishop is eager to have qualified clergy from within the Diocese be given serious consideration by congregations in search. Any priest in the Diocese who meets the qualifications of the position may enter discernment with permission of the Bishop.

Diocesan Transition Minister invites candidates to discernment

If candidates have been identified through the Diocesan Transition Ministers Conference, the Transition Officer will contact them directly to invite the candidate to discern with the congregation. Candidates may receive many invitations to discern and so may accept or decline an invitation. Once they have accepted the invitation, they will forward their materials to the Transition Officer and the congregation. Notify and thank all candidates when you have received their materials, and give the projected timeline of the search.

PHASE 3

INTERVIEWING

Since we are living by the Spirit, let us follow the Spirit's leading in every part of our lives.

Galatians 5:25

Almighty and eternal God, so draw our hearts to thee,
so guide our minds, so fill our imaginations,
so control our wills, that we may be wholly yours, utterly dedicated unto you;
and then use us, we pray, as you will,
and always to your glory and the welfare of your people;
through our Lord and Savior Jesus Christ. Amen.
(BCP p 832)

Diocesan Transition Minister receives 3-5 names and refers to Bishop for final list

Once the period for receiving names has passed, (generally 6-8 weeks) the vestry task is now 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.

Bishop adds or removes candidates and approves official list

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.

Video Interviews / Reference checks / Reduce list to final candidates

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. See Appendix J for Communicating with Candidates.

INTERVIEWING (CONTINUED)

The 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
- Discernment workshop
- Review of onsite interview schedule and accountabilities

Notifying Candidates who are no longer under consideration

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. See Appendix J for Communicating with Candidates.

Notify Canon of List of final candidates to initiate Background check

When the vestry has arrived at final list (usually 1-3 names) of final candidates, those names with full private addresses should be reported to the Bishop's Office so that a full background check on each candidate may be initiated. The Bishop will also contact their respective Bishop counterpart in the dioceses in which the finalists have practiced significant parts of their ministry.

When the vestry decides on its finalists, background checks should be initiated. Background checks concerning sexual misconduct and criminal offenses are required for all clergy at any point of transition (pre-ordination, licensing, and employment) in the Diocese of Long Island. All finalists must have a complete background check. This differs from the preliminary background screening performed by the Bishop's Office, which simply insures that candidates are priests in good standing.

The time needed to complete a formal background check may be as long as 6 weeks. It is important for the vestry to understand that a background check must be initiated as soon as possible with finalists' names forwarded to the Bishop's Office. No Letter of Agreement may be signed without a completed background check.

The congregation is responsible for the cost of background checks, which vary depending on whether the candidate has previously completed a background check for the Diocese of Long Island or for Province II. In such cases, the results may be transferred or updated, for a cost of \$45. The cost of a full background check is \$175.

Bishop's Meeting with Final Candidates

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)

Vestry arranges 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.

Vestry interviews and meets to share impressions

At the conclusion of each site visit with interview, 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, a meeting is scheduled to discern the call.

PHASE 4

THE CALL

May the Lord direct your hearts to the love of God and to the steadfastness of Christ.

2 Thessalonians 3:5

Almighty and everliving God, source of all wisdom and understanding,
be present with those who take counsel
[in _____] 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.

Vestry meets to discern election

Meeting with the Consultant, the vestry gathers for a three-hour retreat for Hearing God's call to ministry using the Heaps of Praise process. Prayer and Bible study are used to tune hearts to the key of the Holy Spirit, and an Appreciative Inquiry process is used to discern if there is a call to ministry together and move to an election.

Contact Bishop for Permission to Elect

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. Please see Appendix K for the Canonical Process for Calling a Rector.

Wardens notify priest and extend call

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.)

Wardens and Clergy negotiate LOA / DTM executes LOA

Details regarding the Rector/PIC's terms of employment (amount of cash stipend, housing arrangements or allowance, moving expenses, benefits, and description of responsibilities) are negotiated with the vestry and/or wardens, and are later spelled out in a formal 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. Assistance from the Bishop's Office, including a template of a LOA, is available. (Appendix L)

Public announcement after LOA is signed

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.

Post Search action review and feedback session

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 M) 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.

THE CALL (CONTINUED)

Celebrate and Close Interim Ministry

Recognition of the ministry of the Interim Priest and bidding him or her good-bye merits the attention of the congregation at the end of the transition period. See Appendix N for Sample Farewell Liturgy to Interim. The Bishop's Office also encourages an exit interview with the departing Interim Priest. Newly called clergy are encouraged to have a conversation with the Interim priest about the congregation's transition experience.

Start of new ministry

When the call has been issued and accepted, it is appropriate for the vestry to recruit a committee of welcome that will assist in the beginning of the new ministry. They might plan coffee and dessert for small groups to assist the new rector in meeting people, provide groceries for the first week, see to it that the rector's office is ready to be occupied, or provide maps and contact information for example. See Appendix O. It is also important to notify the local Dean so that he or she may welcome the new rector as well.

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

It is customary after the arrival and settling in of the new Rector/PIC for the parish to schedule a Celebration of a New Ministry with the Bishop's Executive Administrator. Priests-in-Charge have their celebration of a ministry after the completion of two years and in discernment with the vestry may be elected as Rector.

Please remember to invite the clergy of the Deanery to participate as appropriate. It is a good way for the new Rector/PIC to meet their fellow colleagues in ministry. We encourage also the invitation of those people who have been helpful throughout this process, including the Consultant, the Interim Priest, and any clergy who have served the parish during the interim period. This liturgy marks the official end of the Clergy Search and the beginning of the Mission Search.

Conclusion

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 seeks 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 you will go on together: the search for God's call for your parish and the Mission God is calling you into.

The Mission Search commences at a time convenient for the parish in the first year of ministry together. The central question for all churches is how to answer the questions: What does God want to do here? How will we understand the call of God's Kingdom and God's will to be done in this place and in our time here? Much of a parish's involvement and benefit depends upon the extent and enthusiasm of participation, and that, in turn, depends upon the leadership of wardens and vestry.

Many parishes report discovery of exciting new dimensions in their ministry, an increased sense of identity and purpose, newly identified resources in lay leadership, a new recognition of its relationship with the Bishop, the wider church and new partnerships inside their community. May all these blessings and many more be yours as you come to the close of this important time of your Clergy Search and prepare yourself for the next search: the search for God's call for your parish and the Mission God is calling you into.

APPENDIX A

Assisting The Rector's Exit Interview

The purpose the exit interview is to provide to the Bishop and new clergy serving in the parish information about community life, policies, ministry and other matters regarding the parish. The interview is scheduled through the Bishop's Office and is generally facilitated by the Transition Minister shortly after the cleric has determined that he or she will be leaving the parish. Parish staff, Wardens and Vestry can assist by assembling the following for the rector or priest-in-charge exit interview and to prepare for the Interim and new Rector/PIC.

Staff, Volunteers, Lay Ministers and Lay Leaders

Please provide any personnel policies and job descriptions for the Rectors exit interview.

- Name all paid staff members. Describe their duties and schedule and location of personnel files.
- Name all key lay ministers and/or lay leaders. Describe their duties and schedules.
- Name all key volunteers. Describe their duties and schedules.

Calendar, Bulletins, Newsletters

Create a thumb drive that has all church calendar events, include weekly Sunday services, special weekday holidays: i.e. Christmas, Holy Week, Ascension and their production schedules. Include weekly studies, prayer groups, healing services, seasonal study dates, fundraisers and their planning schedules. Note specific established monthly days for vestry, wardens and committee meetings.

Pastoral Needs

Create a thumb drive of parish directory annotated according to members' pastoral needs (or alternately, a list of parishioner names, addresses, phone numbers and needs in writing) is a useful supplement to the exit interview. Consider including a recent pictorial directory, if available.

- Name any particular pastoral routines, prayers, ministries in the parish (include helpful details: date/time/place, etc.).
- Do you hold services in community ie, a nursing home, or youth shelter? If so, which ones?
- Names and contact information of the sick and shut-in?
- Who will need pastoral attention during the first few weeks of the interim period?
- Are there other members of the congregation who will need special attention?

APPENDIX B

Parish Financial Data

You are requested to submit to the DTM the current year and the previous two year's financials information. For the current year, please submit the present annual budget and two most recent monthly financial statements. You may download and fill out this form for each year.

| | |
|---|--|
| Total Budget: | \$ |
| Total Debt: | \$ |
| Total Pledge paid to Diocese: | \$ /year |
| Diocesan Aid received: | \$ |
| Total Pledges: | Number: \$ |
| Pledge Payment current? | Yes No |
| Audit done? | Yes No |
| Total Clergy Compensation (See Diocesan Clergy Compensation Guidelines) | \$ |
| Housing: | Supplied for ____ persons Cash Allowance |
| Health Insurance: | \$ |
| Clergy Pension: | \$ |
| Car/Travel Allowance: | \$ /year |
| Continuing Ed. Allowance: | \$ /year # weeks /year |
| Vacation: | # weeks /year |
| Other Expenses: | \$ /year |
| Housing Equity: | % |

APPENDIX C

Sample Budget for the Search Process

| | |
|---|--------------------|
| Open Doors New Futures Consultant | |
| Clergy Search fee: | \$2000 |
| Mission Search fee: | \$3000 |
| Typically 18 months needed for both phases. Payable in installments over time of engagement. | |
| Mock Interview honorarium | \$225 |
| Discernment Retreat: | \$200 |
| Food, facility expenses, non-overnight, led by interim PIC | |
| Background checks: | \$135 - \$525 |
| 3 final candidates: \$45-\$175 per candidate | |
| Final Candidates' Visits to Parish | \$500 - \$2500* |
| Webpage Development | \$0-1500 |
| Moving Expenses of New Rector | \$3000 - \$12,000* |
| 1 moving van + 1 car | |
| Celebration of New Ministry | \$300 - \$600 |

* These figures are estimates only and vary greatly depending on how wide the search is extended geographically in the final stages and the location of the Rector/PIC-elect.

APPENDIX D

Interim Priest-in-Charge Program in the Diocese of Long Island

The Interim Priest is trained to assist parishes during a time of transition, especially during the period between the leave-taking of one rector and the calling of another rector. Interims are especially important when a rector has been at a parish for an exceptionally long time or there has been significant organizational or pastoral difficulty in the parish. It is an intentional ministry of sustaining the direction and ministry of a congregation. Reviewing the past, assessing the present, and preparing for the new call.

The major goals of the Interim Priest's ministry is to prepare the congregation for the coming of the next Rector/PIC. To this end, the Interim Priest shall cultivate the practices of discernment prayer and work with leadership and congregational development in the six developmental tasks of the interim period:

- 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.

Selection of the Interim Priest in Charge

- The Bishop through the Diocesan Transition Minister will identify a suitable Interim Priest from among qualified local candidates or recruit qualified “external” candidates for the position.
- The Bishop will recommend one candidate to the wardens and vestry.
- The candidate meets with the vestry. Note: Normally, this should take the form of an informal vestry conversation (greet/meet). The candidate is not to be subjected to a prolonged “approval” process by the parish.
- If the vestry and the candidate agree, a Letter of Agreement (Appendix L) setting forth the mutual obligations and responsibilities of the Interim and the vestry is negotiated. The appointment is official upon the approval of the LOA by the Bishop.
- If the proposed appointment of the Interim Priest is not felt to be a “good fit” by either the vestry or the clergy person, the Bishop will draw upon that experience in order to identify another candidate for appointment. The presentation of a subsequent candidate is dependent upon the identification and availability of suitable candidates, and may require weeks or months.

APPENDIX D (CONTINUED)

Interim Priest-in-Charge Program in the Diocese of Long Island

Vestry Responsibilities

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

Interim Responsibilities

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

- Work with the Vestry and other lay leaders to maintain the regular schedule of worship services and preaching, education, pastoral care and pastoral offices (weddings, funerals, baptisms), calling upon the sick and shut-in, visiting newcomers, and ongoing administration of the parish.
- Supervise all parish staff in the exercise of their responsibilities and ministries, for which they shall be accountable to the Interim.
- Function as Chair of the Vestry and support the Vestry in its responsibilities. The major goal of the Interim's ministry is to prepare the congregation for the coming of the next rector. To this end, the Interim may:
- Help the congregation deal with its grief and any other unresolved issues arising from the departure of the previous rector and any other clergy.
- Deal with internal conflicts and help heal any divisions within the congregation.
- Help the Vestry, lay leaders and staff make such changes as may be needed to align parish life and administration with generally accepted standards in the diocese and the Episcopal Church. The Interim shall communicate regularly with any consultant in the calling process, but shall not work with the vestry as they solicit and screen candidates. Interims are not promoted as candidates.
- Monthly reports by the Interim Priest may be required and attendance at meetings and trainings of the Interim's Group are expected by the Bishop.

If no Interim is identified, Sunday coverage of congregation's may be organized by the Dean of the deanery in partnership with the Transition Ministry Team. Deanery rotation coverage is typically Eucharist twice a month offered by deanery clergy and Morning Prayer offered twice a month offered by lay leaders of the congregation and may involve change of service times to accommodate deanery coverage. Diocesan standard of supply compensation applies to each visiting deanery clergy.

APPENDIX E

Sample Liturgy for the Commissioning of Vestry in Clergy Search

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

Wardens: We present to you this vestry to be admitted to the ministry of the Clergy Search.

The Celebrant says the following words:

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

The Celebrant asks the wardens:

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

Wardens: We believe they are.

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

Vestry: I will.

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

In the Name of God and of this congregation I commission the vestry of _____ Church to search and call the next Rector/PIC of _____ Church.

APPENDIX F

Liturgy for the Ending of a Pastoral Relationship

From the Book of Occasional Services

Departing Minister:

On the {day} day of {month}, {year}, I was inducted as rector of {parish}, {town}, New York. I have with God's help and to the best of my abilities, exercised this trust, accepting its privileges and responsibilities.

After prayer and careful consideration, it now seems that I should leave this charge, and I publicly state that my tenure as rector of this parish ends this day.

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

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

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

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

People: Amen

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

People: Amen

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

People: Amen

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

People: Amen

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

People: We do.

APPENDIX F (CONTINUED)

Liturgy for the Ending of a Pastoral Relationship

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

Silence

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

Silence

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

Silence

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

Silence

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

Silence

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

APPENDIX G

Saying Goodbye Well

- Suggest that parishioners take time individually to share a few last words or a card or letter with the outgoing priest. Tie up any loose ends.
- Encourage all parishioners to be a part of the Farewell. Some examples:
 - Work with the Sunday School on a goodbye project
 - Check in with vestry to see what's planned ...maybe they need skit actors ...or someone to write a goodbye ditty for the Choir to sing, a prayer to be written, and laying on of hands
 - Bake a cake for the last coffee hour
 - And to be sure to attend the party and the last Sunday Service
- The community should give a community gift to the outgoing priest, something formal from "All of You." It can be an item or money collected ("a purse"). A gift from the Parish marks the importance of your communal relationship with the outgoing priest.
- At the final farewell, the vestry is responsible to line up appropriate speakers.
- A letter should be sent to the parish from the wardens and vestry assuring the community about services, pastoral coverage, and the next steps in the Transition Process.
- The Farewell Liturgy is the responsibility of the Priest. The Wardens should, however, be involved (either directly or through appointment) in the planning of the service. The vestry is responsible (along with the outgoing priest) to make sure the community understands that after the Goodbye Liturgy, the pastoral relationship with the outgoing priest is ended. This means Weddings & Funerals in the future will be done by the Interim or the next Rector/PIC after that person is called.

APPENDIX H

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 H (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 H (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: | <input type="text"/> |
| # of Students: | <input type="text"/> |

Day School:

| | |
|----------------|----------------------|
| # of Teachers: | <input type="text"/> |
| # of Students: | <input type="text"/> |
| Total Staff: | <input type="text"/> |

APPENDIX H (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 I

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 J

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 K

Canonical Process for Electing a Rector

The election of a rector is a canonical process with a few important steps. Please take a moment to review Canon III.9 and the procedural checklist below. Questions? Please do not hesitate to contact The Bishop's Office: 516-248-4800 x35.

Constitution and Canons of the Episcopal Church

Canon III.9 *The Appointment of Priests*

(2) No Parish may elect a Rector until the names of the proposed nominees have been forwarded to the Ecclesiastical Authority and a time, not exceeding sixty days, given to the Ecclesiastical Authority to communicate with the Vestry, nor until any such communication has been considered by the Vestry at a meeting duly called and held for that purpose.

(3) Written notice of the election of a Rector, signed by the Wardens, shall be forwarded to the Ecclesiastical Authority. If the Ecclesiastical Authority is satisfied that the person so elected is a duly qualified Priest and that such Priest has accepted the office to which elected, the notice shall be sent to the Secretary of the Convention, who shall record it. Race, color, ethnic origin, sex, national origin, marital status, sexual orientation, disabilities or age, except as otherwise specified by these Canons, shall not be a factor in the determination of the Ecclesiastical Authority as to whether such person is a duly qualified Priest. The recorded notice shall be sufficient evidence of the relationship between the Priest and the Parish.

Procedural Checklist for Parishes calling Rector having been through the Search Process:

1. The warden forwards (in writing) the list of candidates to the Bishop.
2. The bishop's office in concert with the wardens, schedules meetings with the bishop for each candidate. After the bishop has met with all the candidates, he provides his counsel to the wardens and vestry (note: The bishop still has the authority at this point to remove a candidate from the clergy search process).
3. Having received the counsel of the bishop, the vestry is permitted to interview their candidates and afterwards convene for the purpose of electing their rector/PIC.
4. Wardens provide (in writing) to the bishop notice of successful election of rector/PIC, including the date of the election and the vote that has been made part of the vestry minutes, using the language contained in the Canons of the Episcopal Diocese of Long Island (see next page).

Procedural Checklist for Parishes going from Priest-in-Charge to Rector

1. Wardens on behalf of the vestry request permission (in writing) of the Bishop to elect their rector/PIC. This often prompts a three-way or designate discussion between the Bishop (or designate), the PIC and the vestry.
2. With bishop's consent, the vestry may hold an election.
3. Wardens provide (in writing) to the bishop notice of successful election of rector/PIC, including the date of the election and the vote that has been made part of the vestry minutes, using the language contained in the Canons of the Episcopal Diocese of Long Island that follows:

APPENDIX K (CONTINUED)

Canonical Process for Electing a Rector

"TO THE RIGHT REVEREND A.B., Bishop of Long Island:

WE, the Church wardens of _____ on behalf of the Vestry of said Parish, now without a Rector, do hereby present unto you The (ecclesiastical title) C.D., trusting that it will be your pleasure to find that said person is a duly qualified Priest and respectfully requesting that upon said C.D.'s accepting the office you forward this Notice to the Secretary of the Convention to record the same.

Further, we respectfully request that upon said establishment of the relation of the Rector and the Parish you institute and cause to said C.D. to be inducted into the same, with all its rights, members and appurtenances, and to do and execute all other things on said C.D.'s behalf which shall belong to your Episcopal Office.

IN WITNESS WHEREOF, we have caused this instrument to be executed the _____ day of _____, in the year of our Lord _____."

Important Note:

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

APPENDIX L

Sample Letter of Agreement for Rector/PIC

This is a sample for your information only. LOAs are always executed by the DTM. Highlighted sections denote specific information to be provided to the DTM.

Letter of Agreement

Between

The Wardens and Vestry of _____

And

The Reverend _____

who has been elected Rector until such time as the relationship is dissolved by mutual consent or as provided by the relevant Canons of the Diocese of Long Island and the General Convention.

PREAMBLE

The Reverend _____ (“the Rector/PIC”) shall lead _____ (“the Parish”) as pastor, priest and teacher, sharing in the councils of this congregation and of the whole church, in communion with our Bishop. By word and action, informed at all times by the Holy Scriptures, the Book of Common Prayer, and the Constitution and Canons of the General Convention and the Diocese of Long Island, the Rector shall proclaim the Gospel, love and serve Christ's people, nourish them, and strengthen them to glorify God in this life and in the life to come.

This Letter of Agreement (LOA) will become binding when three copies of this document with original signatures thereon have been sent to the Bishop of Long Island.

SECTION A - TIMES OF WORK AND LEAVE

The work of the Rector/PIC includes not only activities directed to the parish and its wellbeing, but also labors on behalf of the Diocese and community. The Rector/PIC's scheduled workweek, in addition to Sunday worship, is five days of mornings, afternoons, or evenings in various combinations reflecting the demands of this ministry. In general, no more than three evenings per week are expected. The Rector is expected to preserve one continuous twenty-four hour period each week solely for personal and family use. All clergy are required to attend:

1. Diocesan Clergy Days
2. Deanery Clericus Meetings
3. Chrism Mass

The Rector/PIC will have the following periods of leave at full compensation:

1. National Holidays, to be taken so as not to interfere with worship on major occasions
2. Four weeks annual vacation, including five Sundays
3. The weekdays following Christmas and Easter
4. Eight days (including one Sunday) for an annual spiritual retreat and one day per month for spiritual direction.
5. Six days per year for continuing education (in addition to vacation)
6. Three months full base package following six years of continual service in a parish for sabbatical leave. Upon completion of a sabbatical a clergy person must remain in his or her current position for minimally one year. Unused sabbatical time will be forfeited.

APPENDIX L (CONTINUED)

Sample Letter of Agreement for Rector/PIC

SECTION B – COMPENSATION

The Rector/PIC's cash salary will be \$ _____ per year to be paid bi-weekly. This salary will be reviewed in January of each year, and may be adjusted based upon the action of the Diocesan Convention concerning base diocesan minimum compensation. During the term of this covenant, the Parish shall pay any other expenses related to the Rector/PIC's cure at the Parish including Workmen's Compensation required by New York State Law. (n.b. New York State Unemployment Insurance Law excludes any clergy, in the exercise of their ministry, from collecting unemployment insurance).

The Rector/PIC shall receive a cash housing allowance which includes utilities in the amount equal to 50% of the cash stipend OR the Rector/PIC shall have full use of the Rectory located at _____ as a personal residence. Expenses connected with the Rectory shall be handled as follows:

1. Utilities shall be contracted for and paid by the parish; and
2. Care and maintenance of Rectory grounds are at the parish's expense.
3. To ensure proper maintenance and care of the Rectory, there will be an annual walk-through of the house and grounds by the Wardens and Rector/PIC.

In accordance with Diocesan Policy, a housing equity account shall be established using the Retirement Saving Plan (R.S.V.P) into which an amount of 3% of total compensation \$ _____ as defined by the Church Pension Fund shall be deposited.

As additional compensation, the Rector/PIC shall receive a sum equal to 50% of the annual self-employment Social Security Tax of \$ _____.

Parish will make the appropriate contributions to the Church Pension fund on behalf of the Rector/PIC. The Church Pension Fund provides the formula used in determining this contribution. Per the current assessable compensation for the Rector/PIC, the annual pension contribution will be \$ _____ (Bishop's Office will determine). The parish will be billed monthly from Church Pension Fund. Every time a component of the formula changes (salary, utility expenses, housing arrangements, etc.), the annual pension contribution will also change.

Parish will provide and pay 100% of the premiums for adequate medical and dental insurance through the Episcopal Church Medical Trust for the Rector/PIC (full, individual, or clergy + one). Due to the densely populated networks in our area, the Diocese has determined adequate coverage to be the Anthem BCBS BlueCard PPO 90 for medical and the Aetna DMO for dental.

The Parish will provide Group Life and Accidental Death and Dismemberment Insurance, equivalent to the group plan provided through The Church Insurance Company.

The Parish will provide \$ _____ and 6 days per year (in addition to vacation) for Continuing Education. The George Mercer School will provide additional programs to clergy or parishes in which this cost presents a financial burden.

Expenses

The Parish will pay the following business expenses incurred by the Rector/PIC in fulfilling the duties of the office:

Reimbursement for the use of a personal automobile for Church business at the rate of 58.5 cents per mile or such other amount as the IRS may prescribe for the business use of a privately-owned vehicle, and any other transportation expenses incurred while on Church business, in accordance with IRS criteria and the Manual of Business Methods in Church Affairs.

APPENDIX L (CONTINUED)

Sample Letter of Agreement for Rector/PIC

The normal expenses of the Church's office operation, such as telephone, cell phone, postage, office equipment, supplies, secretarial services, books and periodicals, as well as usual and customary expenses incurred in carrying out pastoral duties.

Telephone and internet access at the Rectory. The telephone number shall be published.

Supplementary Compensation

The Rector/PIC shall not charge fees for performing any rites of the Church (for example, Baptisms, Marriages and Funerals) for members of the Parish. However, the Rector/PIC may receive income from other sources, such as Sacramental services on behalf of persons not in any way related to the Parish; fees and honoraria for professional services performed on personal time for groups unrelated to the Parish; or for sermons, books or articles published outside the parish.

SECTION C – ALMONERS FUND (Discretionary Fund)

The Parish will provide \$ _____ from the operating budget each year for an Almoners Fund to be dispersed by the Rector/PIC. Almoners Fund is an account of the Parish. It may be kept in a separate account in the name of the church (i.e. "Parish: Rector/PIC's Almoners Fund"). Almoners funds are subject to audit and are included in financial reports following standard accounting procedures.

OR the following statement of intent:

On the first Sunday of every month the parish has a free will offering. Proceeds from this offering will be placed into the Almoners Fund to be dispersed by the Rector/Pic. The Almoners Fund is an account of the Parish. It may be kept in a separate account in the name of the church i.e.: St. David's Rector/PIC Almoners Fund.

SECTION D - USE OF BUILDINGS

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

SECTION E - OPTIONAL MISSION SEARCH OF OPEN DOORS NEW FUTURES

1. Leadership in Transition Retreat
2. Open Doors New Futures Mission Search: Rector/PIC, leadership and congregation undertake the following activities during the first year:
 - Living History with leadership and congregation
 - Neighborhood Exploration consisting of demographics study, neighborhood prayer walks, and neighborhood conversations
 - Community Panel with congregation and local community leaders
 - Discovery Cafe with congregation and community members
 - Parish Planning Summit with leadership and congregation

APPENDIX L (CONTINUED)

Sample Letter of Agreement for Rector/PIC

SECTION F - MUTUAL MINISTRY VALUATION

A Mutual Ministry Valuation will be scheduled between the first fourteen to eighteen months of a new pastorate and once every year thereafter. This will give the Vestry and Rector/PIC time to talk together about ways to improve their working relationships, to discuss how the various church activities and programs are meeting the needs of the church and the congregation, and to look at new ideas for ministry. It is a time to ask: "What is working well and what needs our attention?" "Do we need to make changes in our stated goals?" "Are our goals relevant to where we find ourselves today?" "Are our expectations fair, realistic, a stretch, but not impossible?" The Mutual Ministry Valuation will be facilitated by a trained consultant.

SECTION G - REVISION

This letter may be revised only by mutual agreement at the time of the annual Mutual Ministry Valuation, except that revisions of compensation and expenses may be mutually agreed upon in a separate budget process.

SECTION H - OTHER AGREEMENTS

1. The Rector/PIC shall begin duties in the Parish on _____.
2. All pay and benefits shall become effective on _____.
3. A copy of this LOA will be sent to the treasurer of the Parish once fully executed by the Bishop.
4. This LOA shall be made part of the minutes of the next Vestry meeting following its signing, and copies shall be given to each new Vestry member.
5. If the Rector/PIC and Vestry disagree concerning interpretation of this LOA, either party may appeal for mediation to a mutually agreed upon third party, the Bishop remaining the final arbiter.
6. If the Parish is to cover moving expenses, please note effective 1/1/19 all moving expenses are taxable income and must be reported through payroll.
7. If support is coming from the Diocese, the Rector/PIC should contact the Diocese to start the conversation with either the Transition Ministry Team and/or the Bishop Diocesan.
8. This LOA is contingent upon the completion of a satisfactory background check and proof of attendance at Sexual Harassment/Exploitation and Child Abuse Prevention Workshops and Racial Awareness Training.
9. The Bishop strongly recommends all churches to participate in the Diocese Payroll Service. Please contact Therese Lynaugh, payroll processor, at tlynaugh@dioceseli.org to obtain enrollment forms.
10. During the first full year, the Rector/PIC will participate in the Leadership Program for First Tuesdays and/or First and Fresh through the Bishop's Office.
11. Newly called clergy are asked to form a team of two-three parishioners to participate with them in the Diocesan Church Development Institute, with participation and/or registration to occur within one year from the start date.

Rector/PIC

Date

Warden

Date

Warden

Date

Bishop

Date

APPENDIX M

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, questionnaire responses of candidates
- 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.

APPENDIX N

Farewell Liturgy for Interim Priest

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

a **Warden** says,

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

A **Warden** continues,

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

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

People: We do

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

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

The Departing Interim gives the final blessing.

APPENDIX N (CONTINUED)

Farewell Liturgy for Interim Priest

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

the **Warden** says,

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

The **Warden** continues,

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

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

People: We do

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

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

The Departing Interim gives the final blessing and dismissal.

APPENDIX O

Welcoming the New Rector/Priest-in-Charge

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

APPENDIX P

Sample Letter of Agreement for Interim Priest-in-Charge

This is a sample for your information only. LOAs are always executed by the DTM. Highlighted sections denote specific information to be provided to the DTM.

Letter of Agreement Between

The Wardens and Vestry of _____

And

The Reverend _____

who has been appointed Interim with the understanding that his/her tenure shall continue for six to eighteen months or until shortly before the arrival of the new Rector/PIC, unless earlier dissolved by mutual consent or upon sixty days' notice of either party.

PREAMBLE

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

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.

APPENDIX P (CONTINUED)

Sample Letter of Agreement for Interim Priest-in-Charge

Vestry Responsibilities

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

Interim Responsibilities

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

- Work with the Vestry and other lay leaders to maintain the regular schedule of worship services and preaching, education, pastoral care and pastoral offices (weddings, funerals, baptisms), calling upon the sick and shut-in, visiting newcomers, and ongoing administration of the parish.
- Supervise all parish staff in the exercise of their responsibilities and ministries, for which they shall be accountable to the Interim.
- Function as Chair of the Vestry, and support the Vestry in its responsibilities.

The major goal of the Interim's ministry is to prepare the congregation for the coming of the next Rector/PIC. To this end, the Interim may:

- Help the congregation deal with its grief and any other unresolved issues arising from the departure of the previous Rector and any other clergy.
- Deal with internal conflicts and help heal any divisions within the congregation.
- Help the Vestry, lay leaders and staff make such changes as may be needed to align parish life and administration with generally accepted standards in the diocese and the Episcopal Church.

The Interim shall communicate regularly with any consultant in the calling process, but shall not work with the Vestry as they solicit and screen candidates.

APPENDIX P (CONTINUED)

Sample Letter of Agreement for Interim Priest-in-Charge

SECTION A - TIMES OF WORK AND LEAVE

- The Interim's work includes not only activities directed to the parish and its wellbeing, but also labors on behalf of the Diocese and community. The Interim's scheduled workweek, in addition to Sunday worship, is five (5) days, usually measured as ten to twelve units of mornings, afternoons, or evenings in various combinations reflecting the demands of this ministry. In general, no more than three (3) evenings per week are expected. The Interim is expected to preserve at least one continuous twenty-four hour period each week solely for personal and family use. All clergy are required to attend:
 - Diocesan Clergy Days
 - Deanery Clericus Meetings
 - Chrism Mass
- The Interim will have the following periods of leave at full compensation:
 - National Holidays, to be taken so as not to interfere with worship on major occasions
 - Four weeks annual vacation, including five Sundays
 - The weekdays following Christmas and Easter
 - One week annually for spiritual retreat
 - Six days per year for continuing education (in addition to vacation)

SECTION B – COMPENSATION

The Interim's cash salary will be \$ [REDACTED] per year to be paid bi-weekly. This salary will be reviewed in January of each year, and may be adjusted for cost of living increases based upon the action of the Diocesan Convention concerning base diocesan minimum compensation. During the term of this agreement, Parish shall pay any other expenses related to the Interim's cure at Parish, including workmen's compensation required by New York State Law. (n.b. New York State Unemployment Insurance Law excludes any clergy, in the exercise of their ministry, from collecting unemployment insurance).

The Interim shall receive a cash housing allowance which includes utilities in the amount equal to 50% of the cash stipend OR the Interim shall have full use of the Rectory as a personal residence.

Expenses connected with the Rectory shall be handled as follows:

- Utilities shall be contracted for and paid by the parish.
- Care and maintenance of the Rectory grounds are at the parish's expense.
- To ensure proper maintenance and care of the Rectory, there will be an annual walk-through of the house and grounds by the Wardens and Interim.

(Depending on housing provided) In accordance with Diocesan Policy a housing equity account shall be established using the Retirement Saving Plan (R.S.V.P) into which an amount of 3% of total compensation as defined by the Church Pension Fund shall be deposited.

As additional compensation, the Interim shall receive a sum equal to 50% of the annual self-employment Social Security Tax.

APPENDIX P (CONTINUED)

Sample Letter of Agreement for Interim Priest-in-Charge

Parish will make the appropriate contributions to the Church Pension fund on behalf of the Interim. The Church Pension Fund provides the formula used in determining this contribution. Per the current assessable compensation for the Interim, the annual pension contribution will be \$ _____ (Bishop's Office will determine). The parish will be billed monthly from Church Pension Fund. Every time a component of the formula changes (salary, utility expenses, housing arrangements, etc.), the annual pension contribution will also change.

Parish will provide and pay 100% of the premiums for adequate medical and dental insurance through the Episcopal Church Medical Trust for the Interim (and their spouse?). Due to the densely populated networks in our area, the Diocese has determined adequate coverage to be the Anthem BCBS BlueCard PPO 90 and Anthem BCBS CDHP 20/HSA for medical and the Aetna DMO for dental.

Parish will provide Group Life and Accidental Death and Dismemberment Insurance, equivalent to or better than the group plan provided through the Diocese.

The Diocese will provide Continuing Education training at the Mercer School of Theology, up to a \$2000 value. The Parish will provide a minimum of \$2000 per year for additional Continuing Education costs.

SECTION C – EXPENSES

Parish will pay the following business expenses incurred by the Interim in fulfilling the duties of the office:

- Reimbursement for the use of a personal automobile for Church Business at the rate of 54.5 cents per mile or such other amount as the IRS may prescribe for the business use of a privately-owned vehicle, and any other transportation expenses incurred while on church business, in accordance with IRS criteria and the Manual of Business Methods in Church Affairs.
- The normal expenses of the church's office operation, such as telephone, postage, office equipment, supplies, secretarial services, books and periodicals, as well as usual and customary expenses incurred in carrying out pastoral duties.

SECTION D – SUPPLEMENTARY COMPENSATION

The Interim shall not charge fees for performing any rites of the Church (i.e.: Baptisms, Marriages and Funerals) for members of Parish. However, the Interim may receive income from other sources, such as Sacramental services on behalf of persons not in any way related to Parish; fees and honoraria for professional services performed on personal time for groups unrelated to Parish; or for sermons, books or articles published outside the parish.

SECTION E – ALMONERS FUND (Discretionary Fund)

The parish will provide \$ _____ from the operating budget each year for an Almoners Fund to be dispersed by the Interim. The Almoners Fund is an account of the parish. It may be kept in a separate account in the name of the church (i.e. "Parish: Interim's Almoners Fund").

OR the following statement of intent:

On the first Sunday of every month the parish has a free will offering. Proceeds from this offering will be placed into the Almoners Fund to be dispersed by the Rector/Pic. The Almoners Fund is an account of the Parish. It may be kept in a separate account in the name of the church i.e.: St. David's Rector/PIC Almoners Fund.

APPENDIX P (CONTINUED)

Sample Letter of Agreement for Interim Priest-in-Charge

SECTION F - USE OF BUILDINGS

It is understood that the general pattern of building use followed during the last Rectorship shall be maintained, unless there is specific action of the Vestry to the contrary. The Interim shall have the right to grant use of the buildings to individuals or groups from outside the parish, only under guidelines approved by the Vestry.

SECTION G - MUTUAL MINISTRY VALUATION

There shall be a discussion and mutual study of the total ministry of the parish after 4-6 months, in order to:

- Provide the Interim, Wardens and Vestry opportunity to assess how well they are fulfilling their responsibilities to each other and to the ministry they share.
- Establish and adjust goals for the work of the parish during the interim.
- Plan healthy closure for the interim ministry and prepare for the coming of the next Rector/PIC.
- Isolate areas of conflict or disappointment which have not received adequate attention and may be adversely affecting mutual ministry.
- Clarify expectations of all parties to help put any future conflicts in manageable form.
- The Mutual Ministry Valuation will be facilitated by a consultant or other Diocesan representative, such as a Dean.

SECTION H – REVISION

This letter of agreement may be revised only by mutual agreement at the time of the annual Mutual Ministry Valuation, except that revisions of compensation and expenses may be mutually agreed upon in a separate budget process.

SECTION I - OTHER AGREEMENTS

1. The Interim shall begin duties in the parish on _____.
2. All pay and benefits shall become effective on _____.
3. The Parish shall reimburse the Interim for relocation services.
4. A copy of this Letter of Agreement will be sent to the Parish treasurer once fully executed by the Bishop.
5. This Letter of Agreement shall be made part of the minutes of the next Vestry meeting following its signing, and copies shall be given to each Vestry member and new members thereafter.
6. If the Interim and Vestry disagree concerning interpretation of this Letter of Agreement, either party may appeal for mediation to a mutually agreed upon third party, the Bishop remaining the final arbiter.
7. The Bishop strongly recommends all churches to participate in the Diocese Payroll Service. Please contact Therese Lynaugh, payroll processor, at (516) 248- 4800 x168 to obtain enrollment forms.
8. This agreement is contingent upon the completion of a satisfactory background check and proof of attendance at Sexual Harassment/Exploitation and Child Abuse Prevention Workshops

Interim Date

Warden Date

Warden Date

Bishop Date

APPENDIX Q

Severance Arrangements upon Retirement or Transition

From time to time a cleric announces their retirement, sets an end-date and works out an arrangement in which the parish extends their salary and benefits beyond the actual retirement date. While such arrangements are permissible, it is important that vestries and clergy be aware of the rules and procedures governing such arrangements.

In some instances clergy transitioning from one call to another may experience a gap of insurance coverage or stipend during movement from one congregation to another. Either church and the clericperson may come to an agreement, extending insurance and/or stipend to cover the gap.

It should be said at the outset that the term “terminal sabbatical” is a misnomer and is not used in the Diocese. A sabbatical is a time of renewal or study for an active cleric who intends to return to the ministry of the congregation having been restored. The term “sabbatical” should not be applied to a priest who is ending a ministry. When a congregation has agreed to extend salary and benefits of a cleric upon his or her retirement, they are agreeing to a friendly severance arrangement with their clergy. The relationship has ended (severed) but an arrangement for additional salary and benefits is made under friendly circumstances.

Severance arrangements are rare and generally not encouraged. A vestry considering such an arrangement must consider the following:

1. Clerics cannot “bank” unused sabbatical time. Sabbaticals must be taken during active ministry.
2. A severance arrangement has the potential of causing financial hardship, placing the parish in a holding pattern, making it difficult to call an interim or even to cover the costs of supply clergy.
3. There can be potential for confusion regarding the end of the cleric’s ministry.
4. Finally, over the course of the cleric’s relationship with the church, payments of 18% of the cleric’s salary and benefits have been paid on behalf of the cleric into the Church Pension Fund. Upon retirement, the Church Pension Fund provides significant benefits including pension payments, extended health benefits, life insurance, and a 20K relocation benefit.

On the rare occasion that a vestry agrees to a friendly severance arrangement, the following Diocesan guidelines must be abided.

1. The cleric, the vestry and the parish must be clear that a severance arrangement does not extend the tenure of the rector. A rector retires, turns in keys, and severs canonical and fiduciary obligations and no longer associates with the parish prior to receiving severance benefits.
2. The arrangement is not to exceed three 3 months.
3. Vestries must be able to show evidence that providing severance benefits will not adversely affect the ability of the congregation to move forward in mission.

ADDITIONAL RESOURCES

1. *Grounded in God: Listening Hearts Discernment for Group Deliberations* by Suzanne G. Farnham, Stephanie A. Hull, R. Taylor McLean: 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
3. [Manual of Business Methods for the Episcopal Church](#)
4. Spiritual Gifts Quiz: spiritualgiftquiz.org
5. Spiritual Gifts PowerPoint
6. *Holy Currencies* by the Rev. Eric Law
7. [Beloved Community Storytelling](#)
8. Open Doors New Futures Guiding Principles PowerPoint

Access these
resources on our
website



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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 Mission Action Plan done by the Anglican Diocese of Toronto, extending thanks especially to Canon Janet Marshall, Director of Congregational Development, the work of Open Doors New Futures done by the Diocese of New York, and the work of Susan Beaumont in *How to When You Don't Know Where You're Going: Leading in a Liminal Time*. We have modified the process and added new tools. The Consultant team of the Diocese of Long Island has shaped this process over a three-year period, and we are deeply indebted to them.

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