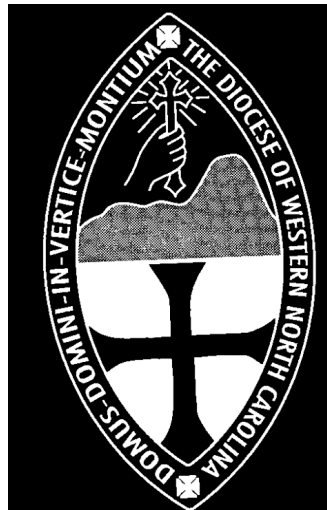


# THE DISCERNMENT PROCESS FOR CALLING A NEW RECTOR

A RESOURCE MANUAL FOR PARISHES IN TRANSITION

## PART I: AN OVERVIEW OF THE PROCESS



### The Episcopal Diocese of Western North Carolina

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THIS MANUAL IS AVAILABLE ONLINE AT  
[www.diocesewnc.org](http://www.diocesewnc.org).

Go to "Policies/Guidelines/Canons"

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## **A Letter from The Bishop:**

Richard Rohr, a Franciscan Friar, has a wonderful saying: “God works on you between first and second base.” Transitions are times when we learn to let go of our carefully constructed idea of what the future will be and open ourselves up to the future God is calling into being. Of course, it’s always scary to leave the safety of first base and be in the awkward middle. We rarely end up there voluntarily. Yet, that is the place of surrendering to God’s will and walking in trust into a new future. That surrender is truly the work God does during this time.

The good news is that people have been in transition before you, and that Jesus is always with you. This Search Manual outlines a procedure that will lead you from first to second base, or from the moment of your Rector’s departure to the arrival of the new Rector.

Although the logic for each of these steps may not seem immediately apparent, I ask that you trust the process. These procedures have come from countless transitions before yours and are designed to enhance the possibilities of a good match between your parish and your new rector. Most of all, I ask that every member of your parish open their heart, soul, and mind to what God is doing in the midst of you. Life is a series of goodbyes and hello’s. It’s in the DNA of the universe. The Risen Christ tells Mary in the garden that she has to say goodbye to him so that she can say hello to the Holy Spirit. God is calling for you to likewise bless the past and be open to an unknown future, confident that God is with you and will lead you into resurrection.

Finally, I remind you that we are all in this together. Each Sunday, I proclaim “One Lord, One Faith, One Baptism” because we are truly one in Christ. Therefore, the diocesan staff is here to support, counsel, and instruct you in how to negotiate your way through this period.

May you know and experience God’s blessings upon you. May some part of you give thanks that you have left first base because you can experience in a new way the One who is leading you not just to second base but home.

Grace and Peace,

+G. *Porter Taylor*  
Bishop, Diocese of WNC

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# THE DISCERNMENT PROCESS FOR CALLING A NEW RECTOR

A RESOURCE MANUAL FOR PARISHES IN TRANSITION

The Episcopal Diocese of  
Western North Carolina

## INTRODUCTION

**First and foremost: if you are reading this manual, *thank you for your service to your parish, your Diocese, and the Episcopal Church!***

This manual provides you with the process by which parishes in the Diocese of Western North Carolina discern God's will in calling a Rector. This process will be administered by the Bishop, the Canon for Transition Ministries, the Interim Rector, the Vestry of the parish seeking a Rector, the Discernment Committee, and a Consultant. The Canon for Transition Ministries will coordinate the process.

### A WORD ABOUT WORDS

**Discernment Committee:** In this manual, we refer to the "Discernment Committee" (abbreviated "DC") instead of the "Search Committee." This is to remind us all that the process of a parish examining itself and prayerfully calling a priest is very different from a corporate style "search" process.

**The Canon:** In ecclesiastical speak, the word "canon" has many meanings (the approved books of the Bible, the "statutes" of the Church, an assistant at a cathedral, or a department head on the Bishop's staff). The "Canon" as used in this manual refers to the "Canon for Transition Ministries" or "Transition Ministry Officer" instead of the more traditional "Canon for Deployment" or "Diocesan Deployment Officer." Using the word "deployment" in this context is misleading in that the Canon is neither in the military nor has the authority to deploy anyone! Part of the Canon's ministry, however, is to assist parishes and clergy in transition.

In our Diocese, the Transition Ministry Officer, the Rev. Canon James H. Pritchett Jr., also serves as Canon to the Ordinary (Canon to the Bishop). You may call him "Jim."

## **WHAT YOU NEED TO KNOW ABOUT THE CANONS**

The canons (here understood to mean the “statutes” of the Church) govern our common lives together and are passed by the General Convention of the Episcopal Church or the Annual Convention of the Diocese. In relevant part, the canons provide that the Bishop serves as the Rector of any vacant parish, and the Bishop has the right to appoint a priest-in-charge during the interim period (although it would be rare that the Bishop would not allow the Vestry to extend that call). Parishes in transition are required to follow the process described in this manual, although the Canon for Transition Ministries is happy to entertain suggestions as to other, creative ways to accomplish particular tasks (so long as he hears them in advance of implementation!). The Senior Warden must notify the Bishop in writing before extending a call to a new Rector. This can be done by an email to the Canon for Transition Ministries. Most importantly, the Bishop must approve any transfer of clergy, including a call to a new Rector. Neither the Bishop nor the Canon want to tell a parish whom to call, but, based on background information and other data that might not be available to the parish, it may be appropriate for the Bishop to ask the parish not to consider a particular candidate.

## **HOW THIS MANUAL IS ORGANIZED**

This manual is organized on the model of a cookbook. Part I is an overview that attempts to give enough detail to make the process comprehensible without bogging down in too many specifics. In the cookbook analogy, the first part teaches you how to cook.

Part II (a separate document so that you can have both open) consists of the numerous Attachments relating to subjects referred to in the first part. In the cookbook analogy, these are the “recipes” for getting specific tasks accomplished.

At a minimum, every member of the DC and Vestry should read Part I and Attachment 1: *Roles in the Discernment Process for Calling a New Rector*. (We suggest that you publish that document to the parish as well.) Members of the Vestry and DC should also at least be aware of the list of Attachments. DC chairs and Senior Wardens should be familiar with the Attachments themselves.

Continuing the cookbook analogy, the discernment process is, like cooking, both science and art. The basic process outlined here has worked well for thousands of parishes. If you wish to be innovative, however, we do not want to discourage you. We do ask, however, that you discuss innovative methods with your consultant in advance. If your method works well, we might incorporate it into this manual!

# THE VESTRY'S WORK

## **INITIATING EVENTS AND SAYING GOODBYE**

The process begins with the resignation, retirement, or death of the Rector. In the event of a resignation or retirement, the Rector, after consultation with the Bishop, will announce to the Vestry his/her decision and will set the date for a resignation or retirement. The Senior Warden then conveys to the Bishop that the Vestry has accepted the resignation. The Vestry then plans an appropriate recognition and celebration of the Rector's ministry.

In the event of a death, the Vestry will work with the Bishop to provide opportunities for the parish to appropriately grieve.

## **THE VESTRY MEETS WITH CANON FOR TRANSITION MINISTRIES TO GO THROUGH THE ENTIRE PROCESS**

The Bishop and/or Canon for Transition Ministries will meet with the Vestry to give an overview of the process and discuss the initial steps. This manual should be downloaded ([www.diocesewnc.org](http://www.diocesewnc.org)). The roles and the responsibilities of the Interim Rector, Discernment Committee, and the Consultant will be discussed and the group will create a plan for how to proceed.

## **SELECTING A SUPPLY PRIEST**

The Senior Warden is responsible for contracting with Supply Priests until the Vestry calls an Interim Rector. A list of supply priests and an honoraria schedule is available online by going to [www.diocesewnc.org](http://www.diocesewnc.org) and selecting "Clergy Resources," then "Supply Clergy." The Senior Warden may solicit additional names for Supply Priests, but no one may serve as a Supply Priest who is not canonically resident or licensed in the Diocese. If you are unsure, call the Canon.

## **ROLE OF THE VESTRY DURING THE INTERIM PERIOD**

The interim period between two permanent rectors is not a time to be idle or to wait for something to happen in the future. While the Vestry will, of course, be busy attending to the details of administering the parish, this is also a vital time of parish life in which the Parish can initiate programs consistent with the parish survey. Renovations might take place, and the Parish will continue to grow in love and service to God. Many parishes find that meeting the challenge of operating without clergy, while not a long-range solution, frees up creativity among the laity and encourages them to use their gifts in new ways. This can and should be a very exciting time! See Attachment 2: *Goals for a Vestry During the Interim Period*.

## **SELECTING AND CONTRACTING WITH AN INTERIM RECTOR**

When considering Interim candidates, a Vestry should to look for:

- Approved interim training (required in our Diocese)
- Experience
- Preaching skills
- The Interim's ability to communicate effectively
- A sense of humor
- Flexibility
- Pastoral skills to help the congregation deal with conflict
- Specific skills your congregation will need

The Canon will provide the Vestry with names of Interim Rector candidates. The Vestry will interview them in order to find the best match for this transition period. It then calls the Interim Rector with approval from the Bishop.

Contracting with an Interim Rector may be undertaken before the Rector has actually terminated, but the Interim Priest will not officiate or celebrate in the Parish until after the Rector has left, and *the Rector is to have no role whatsoever in the selection of the Interim.*

The Canon will email the Senior Warden the Interim Rector Letter of Agreement upon request. (See Attachment 3: *About the Interim Rector Letter of Agreement.*) The Canon will also advise as to what changes may be made to reflect your situation and what provisions must remain in the Letter of Agreement. The Letter of Agreement must be signed by the Bishop as well as the Interim Rector and Wardens.

The Vestry and congregation should be aware of the following provisions (which you can publish in the newsletter or make a handout):

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

An interim period is prime time for renewal, reenergizing the parish in its life and mission. Beyond maintaining effective ministry during this period, the Vestry and Interim Rector shall work together to prepare for healthy transition to the next rectorship. Specific tasks to be addressed include:

1. Coming to terms with the history of this congregation and its relationships with previous clergy.
2. Discovering the congregation's special identity, what it dreams of being and doing apart from previous clergy leadership.
3. Dealing with shifts in leadership roles that naturally evolve in times of transition, allowing new leaders to come to the fore constructively.
4. Renewing and reworking relationships with the diocese, so that each may be a more effective resource and support to the other.

5. Building commitment to the leadership of the new rector in order to be prepared to move into the future with openness to new possibilities.

### **Vestry Responsibilities**

All ministries other than those reserved to ordained leadership (such as administering the sacraments) are understood as mutual ministries of the laity of the parish and the Interim Rector. The Vestry shall lead the laity to support and cooperate with the Interim Rector 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 Rector. The Vestry will see that the Interim Rector is properly supported, personally and organizationally as well as in the Vestry's financial obligations to the Interim Rector.

### **Interim Rector Responsibilities**

The Interim Rector represents and extends the ministry which is the Bishop's pastoral and canonical responsibility for congregations in leadership transition. The Interim Rector 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 Rector shall

1. 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.
2. Supervise all parish staff in the exercise of their responsibilities and ministries, for which they shall be accountable to the Interim Rector.
3. Function as Chair of the Vestry, and support the Vestry in its responsibilities.

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

1. Help the congregation deal with its grief and any other unresolved issues arising from the rector's departure.
2. Deal with internal conflicts and help heal any divisions within the congregation.
3. 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.

The Interim Rector shall communicate regularly with any consultant in the calling process, but shall not work with the Calling Committee as they

develop the parish profile and solicit and screen candidates. ***The Interim Rector shall not be eligible to be a candidate for Rector.***

## **THREE ALTERNATIVE DISCERNMENT PROCESSES**

Before appointing a Discernment Committee, the Vestry must decide which of three options for a discernment process is appropriate. *Avoid the temptation to rush to getting a new rector!*

This manual assumes Option One, below, but the Canon will discuss three options:

### **Option One**

This process includes a parish discernment phase that involves the entire congregation through use of a Survey and the “Holy Conversation.” This option is the most labor intensive on the part of the DC and may take ±12-15 months to complete. In some parishes, it might be appropriate for the process to move at a slower pace, especially after a long tenure or significant unresolved conflict.

The advantages to this option are: (1) the DC can create a more in-depth profile with more accurate demographic information, (2) gathering data from everyone in the congregation gives a more accurate picture, (3) the process builds community, and (4) the congregation has a much stronger sense of “buy-in.” After the parish self-discernment phase, a period of 6-8 weeks is set aside to receive names of interested candidates. This option is the more traditional search method.

### **Option Two**

This process takes slightly less time because only the DC and the Vestry are surveyed and participate in the “Holy Conversation,” not the entire congregation. In addition, the Canon for Transition Ministries will (if possible) present a maximum of 4-6 approved names for the DC’s consideration. Parishioners are also free to submit additional names to the Canon for Transition Ministries (for a very limited period) for screening and consideration by the Bishop.

This option is a way to move the search process along more quickly and at (slightly) less expense. It requires the Bishop’s permission.

### **Option Three**

In certain situations, it may be more appropriate for the Bishop to simply submit one or two names for consideration by the Vestry, rather than establish a separate Discernment Committee. This option assumes that there is a strong level of trust between the Parish leadership and the Bishop. Use of a consultant is highly recommended but is not required in this option. The Bishop’s permission is required for this process.

## **THE ROLE OF THE CONSULTANT FOR THE DISCERNMENT PROCESS**

The Diocese of WNC requires the use of a Discernment Consultant throughout the process. The Consultant's job is to guide the Vestry and DC through the process. They are there to help! The Consultant's role is *not* to make decisions on behalf of the DC or Vestry or to substitute the Consultant's judgment for that of the committee.

The Canon for Transition Ministries will assist the vestry in hiring a Consultant. The Consultant will help the DC work with the congregation to

- establish a budget and schedule;
- answer questions;
- help clarify the parish's future needs, dreams, and visions;
- facilitate the Holy Conversation
- establish procedures for drafting the profile;
- train the DC to conduct phone or teleconference interviews;
- train the DC to make site visits;
- train the DC to conduct personal interviews;
- stay in contact with the Transitions Ministry Officer for the Diocese;
- help the DC to follow the process.

The Diocesan Office has established the fee schedule. It is the same for every Consultant. (See Attachment 4: *The Consultant Letter of Agreement.*)

## **CHOOSING A DISCERNMENT COMMITTEE**

The discernment process during an interim period is a very exciting time in the life of the parish. There is an old saying, "Change is inevitable; growth is optional!" Whether or not your parish grows spiritually during this time will depend in part on the Vestry's willingness to lead during a period of change. The Diocese is here to help. You will be in our prayers, and we will provide all the resources, advice, and help we can. May God bless you in this exciting endeavor!

This section is intended to provide guidance to the Wardens and Vestries in the Diocese of Western North Carolina who are faced with the task of beginning the process of parish discernment that will lead to the call of a new rector.

The Vestry selects the Discernment Committee (DC), which should consist of 7-11 members, the number depending upon the size of the congregation. More than this number becomes too unwieldy and less than this number is too few.

It is *extremely* helpful of every member of the DC to have email and know how to download documents. This should be required for the chair.

The first step in selecting the DC should be to choose a chair. This decision should be made prayerfully and carefully. The chair should be someone who is deeply committed to the parish and the Episcopal Church. They should be a person of prayer and faith who is recognized as a spiritual leader in the parish. The chair should be very good at group process, know how to run a meeting, and exhibit demonstrated leadership talents. The Chair should be willing to work with a Consultant and the Canon to the Ordinary. The chair should be a team builder and a bridge builder. They should be able to delegate and not feel as if they need to control every aspect of the process. The chair should be someone who will not attempt to dominate the Committee, but will trust that the Holy Spirit will work through the Committee and the process.

Next, the Vestry should recruit a Spiritual Guide for the Committee. This (layperson) should be a person of prayer. Although they will be a full member with voice and vote, their special task will be to keep the discernment process enveloped in prayer. Those asked to serve will often think that they do not know how to do this. Assure them that the Diocese will provide them with materials and ideas, and that their task is not to be the “designated one who prays” for the Committee, but to assist the entire Committee (and the parish) in steeping the process in prayer. (You should copy and download Attachment 44: *Resources for Spiritual Guides* to help with recruiting.)

The Vestry should then consider whether it wants to consult with the Chair and the Spiritual Guide to pick the rest of the DC, or engage that task without their input.

The DC should consist of highly respected parishioners who are recognized representatives of the Parish. Care should be taken that members be people of recognized faith, who are fair minded and articulate. They should be people who can represent the best interests of the entire Parish and who are compatible and flexible. To the extent possible, make sure the DC reflects the parish in its diversity of opinions, ages, theological views, educational levels, etc. It is highly preferable that every member of the DC be able to receive email and open documents on it.

One member of the Vestry should serve on the DC as the liaison, preferably neither the senior or junior wardens (who will probably be too busy). The Vestry Liaison is a full member of the DC with voice and vote. They will report to the Vestry on progress (while maintaining confidentiality as to names) at least monthly. Avoid picking someone whose vestry tenure will not exceed the discernment process.

It is *highly* preferable that spouses of Vestry members NOT serve on the DC. In small parishes this can be a challenge, but it is preferable in order to maintain confidentiality.

The Vestry should also consider the range of skills the DC will need to complete its work. The DC will generate a Survey (requiring someone with skills tabulating data), hold a “Holy Conversation” (requiring someone who can orchestrate an event), generate a Parish Profile (writing, editing, formatting, and computer skills needed), correspond repeatedly with candidates (requiring a correspondence secretary), and interview candidates (social skills, perhaps human resource skills needed). The DC will also need someone to take minutes at meetings.

There is one required quality of a DC member that notes special mention. DC members also *must* be persons who will hold the proceedings and the conclusions of the meetings in the strictest confidence. (This means, for example, that they **may not discuss confidential matters with their spouse or best friend.**) The confidentiality issue must be considered very carefully in selecting each member of the DC.

Anyone who is an adult member in good standing (meaning that the record of their baptism is at the church, they attend regularly, they support the parish financially, and are at least 16 years old) may serve on the DC. If you wish to have a student, please take into consideration that s/he will be required to attend weekly or bi-weekly meetings for approximately one year and will be staying overnight in hotels when visiting candidates in their home parishes.

Serving on the DC is a big commitment. Be sure to thank these folks regularly while they work!

## **CHARGING AND COMMISSIONING THE DC**

When the Vestry has appointed the DC, it should issue a charge. See Attachment 5: Charge to the Discernment Committee. The Senior Warden should also request that the Interim commission the DC at a Sunday service.

## **PROVIDING INFORMATION ABOUT THE PARISH**

Attachment 6 is a document entitled, “Information the Vestry Needs to Provide.” Besides being a good inventory of the parish’s life and assets, this information will be very helpful to the DC and the Canon. The Vestry does not need to provide this information before charging the DC, but should provide it (to the DC and Canon) before the DC begins the process of writing the Parish Profile. The form is available as a Word document by emailing the Canon.

## **SPEAKING OF MONEY**

The form discussed above asks the Vestry to define the compensation range. It is important that the vestry do so carefully and realistically. For example, you cannot afford a full time priest unless you can afford to pay for family health insurance. Work with the Canon to determine the cost of salary, housing, and benefits.

The information you provide to the Discernment Committee will be given to candidates. It is important that the “money talk” occur early in the process. No one wants to invest in a process if it is destined to break down in the end over finances.

## **MAKE SURE THE PARISH WEB PAGE IS READY FOR VISITORS**

When your parish opening is advertised, clergy will look at your web page to see whether they are interested. Look at your web page as if you have never seen it before. Is it attractive? Is it informative? Is it honest? Is it easy? What unspoken message does it send? This is the time to get your “cyber house” cleaned up and ready for company!

## **THE SENIOR WARDEN’S CHECKLIST**

Attachment 7 is a checklist for the Senior Warden.

# **THE DISCERNMENT COMMITTEE’S WORK**

## **PARISH SELF-DISCERNMENT: A TIME FOR GROWTH, NOT PANIC**

The interim period between two rectors is a time to dream and work for God’s glory – not to hold your breath. It is crucial that each Parish go through a process of self-reflection and dreaming; what is God uniquely calling us to be? To do? How are we to initiate the kingdom here on earth in a new and vital way to reach the lost, the needy, and the spiritually bereft? This process asks not just, “What makes you comfortable,” but, “What does our church need in order to be what God is calling it to be?”

We encourage parishes to take their time discerning whom they should be calling. There is sometimes a tendency to want to rush born out of fear of what will happen if the rector is not replaced quickly. Don’t panic! The Diocese has guided many, many parishes through transitions, and your parish will be better off for having gone through a careful discernment process.

This is also the time to address old hurts and issues. Do not wait for the new Rector to step into the hornet’s nest. Deal with the old and be ready for the new. The Interim and the Diocesan staff are available to help!

## **GETTING ORGANIZED**

Depending on the Discernment Process Option the Vestry chose, the DC typically will need to accomplish the following tasks:

1. Prepare and analyze the Parish Survey
2. Make necessary arrangements for the Holy Conversation
3. Compile data from the Holy Conversation
4. Gather information for the Parish Profile
5. Write and layout the Parish Profile (which can be divided into sections)
6. Edit the Parish Profile (one editor helps continuity)
7. Put the Parish Profile on the parish web page (after approved by Consultant, Canon, and Vestry)
8. Receive information about candidates by email (the chair usually does this)
9. Keep track of candidates' progress through the process
10. Correspond with candidates
11. Interview candidates (on the phone and in person)
12. Conduct reference checks

The Chair and the Consultant should work together to devise a committee system so that members' skills are used efficiently, and no one is overworked and worn out. Note that the DC can ask members of the parish who are not on the DC to assist in any task that does not involve or reveal the names of candidates. For example, an excellent writer who could not make the commitment to be on the DC might nevertheless be able to write or edit the Parish Profile.

The Consultant will also help the chair work up a timeline. (See attachment 8: *Timeline for a DC*. See also Attachment 9: *Tips for Getting Started* (which the entire DC should review); Attachment 10: *Suggested Agenda for the First Meeting of a DC*, and Attachment 11: *Checklist for a DC Chairperson*.)

## **ATTENDING TO COMMUNICATION DURING THE PROCESS**

Facilitating clear, open, and *frequent* communication throughout the process is an extremely important part of the DC's job. Parishes that do not receive information frequently will often fill in the information vacuum with speculation and gossip. Please see Attachment 12: *Communication* for specific tasks.

## **PARISH DATA GATHERING**

This manual discusses data gathering by using a survey and Holy Conversation. Keep in mind that there are other ways to gather data (all of which have pros and cons). See Attachment 13 *Options for Parish Data Gathering*.

## **PARISH SELF-DISCERNMENT: THE PARISH SURVEY**

With the guidance of the Consultant, the DC will write, distribute and gather back a Parish Survey. This is an important task because the skills and talents of the new rector will be evaluated based in part on the results of the survey. Although members of the DC will, of course, rely on their personal responses to the

candidates, the DC will be comparing each candidate to the skills and talents desired by the Parish (as expressed in the survey and Holy Conversation) rather than to the other candidates.

The survey will help discover goals of the Parish. If the parish is unclear or ambiguous about these goals, the parish may need to do some additional work after completing the survey to get a deeper sense of clarity. The Consultant and Interim Rector can help with this. If the Parish is not clear on its direction and/or the skills and talents required of the future rector to help the Parish get there, the DC will have a difficult time choosing a good candidate for the Parish.

Attachment 14 is a sample survey for the DC to use. Note that the survey and the Holy Conversation for Discernment (see below) may be instituted simultaneously or in any order.

## **PARISH SELF-DISCERNMENT: THE HOLY CONVERSATION FOR DISCERNMENT**

In addition to using a survey to gather information, the DC should organize a Holy Conversations and invite the entire parish to engage in a discernment conversation. Holy Conversations are fun, build up community, allow parishioners' ideas and enthusiasm to build upon one another, and leave open the potential for the Holy Spirit to surprise us! (Frankly, surprises are rarely a part of written surveys, the results of which can often be predicted before the survey is taken.) Surveys have their place; some people who will not (or cannot) attend a Holy Conversation will fill out a survey. Surveys are also very useful in harvesting statistics: how many attend each service, who is involved in what ministries, etc. They are sometimes less helpful tools for discernment.

Here is an overview of how a Holy Conversation works: parishioners gather amidst overflowing hospitality (dinner, dessert, a hymn sing, something fun!). They *randomly* divide into groups of no more than five (ask them not to stick with friends, etc.) and discuss carefully pre-selected questions. Answers and points of interest are recorded. After 12-15 minutes, each group briefly reports out to the entire gathering. The facilitator (typically your Consultant) leads a brief discussion "knitting" together common themes, etc. from the small groups by asking, "What did we hear in common? What was different? What did we not hear that we might have expected to hear?" Parishioners then randomly go to new groups for another round. The process repeats until participants have gone through three rounds. All data is recorded and parishioners are assured that it will be used.

The following are some sample questions. Because of the importance of the questions, the DC might want to ask the Vestry to assist in designing the questions, or the Vestry (which makes the final decision to extend a call) might ask to have that input. Either way, the Consultant should be involved in this process.

Round 1:

- a. What was your best and most meaningful moment or incident at the parish in the last year?
- b. Who and/or what made that possible?

Round 2:

- a. What now needs the attention of the rector and vestry? What would you like to strengthen?
- b. How can we use what we do *well* to strengthen these areas?

Round 3:

- a. What do you see as God's dream for the parish in the next five years? Be concrete and specific.
- b. What specific, concrete steps can the parish and you take to help make that a reality?

Attachment 15: *Holy Conversations for Discernment* provides detailed instructions on how to hold a Holy Conversation.

## **PRODUCING A PARISH NARRATIVE PROFILE**

Once the survey and Holy Conversations are completed and the results have been reported to the congregation (we recommend an article in the newsletter), the DC will produce a Parish Profile in electronic form for the church's website. The Consultant usually has samples on file and assists with the production of this publication. The purpose of the Profile is to give candidates and parishioners a more complete picture of the Parish and its hopes for the future.

Essentially, the Parish Profile is a marketing piece for the church to attract the candidates who will be well suited to be the next Rector. **The profile must, however, be absolutely honest!** It is not necessary to give an unrealistically gloomy picture of the parish, but it is also imperative that the profile not give an unrealistically rosy picture. *Every* parish has issues. Failing to address them will make it less likely that the candidates who apply will be well suited to deal with the parish's challenges. Failure to be honest often results in two unhappy consequences: (1) clergy read the profile and say, "These people don't need me; they don't even Jesus!" or, even worse, (2) the new Rector arrives only to be deeply disillusioned in the first few months by differences between the reality they find and what they were told (or not told) about the parish during the discernment process. Furthermore, rather than being dissuaded from applying by a discussion of the parish's challenges, good clergy are often favorably impressed with a profile that is honest.

Tell the truth! Tell it tactfully, carefully, diplomatically, lovingly, but tell the truth!

The profile is sent to the Canon for Transitions Ministries for review (*after it has been proofread!*). Primarily, the Canon will attempt to look at the profile through the eyes of a priest who does not know the parish. Is all relevant information

included (like financial data and whether the position is full time or part time)? Does the profile inadvertently use language that might have a different meaning to clergy?

Once the Canon has approved the profile, it is sent the Vestry for review. If the Vestry makes significant changes, the revised profile is sent back to the Canon. When everyone has signed off, the DC ensures that the Parish Profile is put on the parish web site (in pdf. form with a conspicuous link on the home page). *Do not post the Profile for public view until it is in final.*

Attachment 16: *Working Toward the Parish Profile* provides lots of specific information about compiling the Profile.

## **COMPLETING THE CDO PISR**

After the DC completes the Parish profile, the next step is to fill out the database form called the Parish/Institution Search Request Form or “PISR.” The PISR is used to produce the computer profile that will go into the Church Deployment Office (CDO) database. Every priest in the Episcopal Church maintains a profile with the CDO. The CDO’s computer will match the parish’s profile with priests’ profiles and produce a list of the 40 most compatible priests.<sup>1</sup> (This is sometimes referred to as the Church’s computer dating game!) The parish’s profile will also be posted on the Positions Open Bulletin (a website maintained by The Episcopal Church that clergy use to discover open parishes). Typically, the wardens and DC chair will fill out the PISR with the Consultant’s help.

The DC and Vestry approve the PISR prior to it being submitted to the Canon for final approval.

The Canon then produces the Computer Profile and the position is listed on the Positions Open Bulletin.

## **THE PERIOD FOR RECEIVING NAMES**

Typically, parishes receive names for six weeks to two months. During that period, the DC may be reviewing information as it comes in (some DC’s elect to wait until the end of the period so they can review all information together), and preparing (with the Consultant) for the next steps. This is productive time to prepare!

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<sup>1</sup> The computer is programmed to include a minimum of 8 females or minorities.

## **GETTING READY TO RECEIVE NAMES: WHAT YOU NEED TO KNOW**

### **KEEPING THE CANON INFORMED**

The DC should have someone who is tasked with keeping track of the candidates. That person, or the chair, should inform the Canon for Transition Ministries when any decisions are made regarding candidates (by emailing an updated list). The Canon gives weekly briefings to the Bishop on all parishes in transition and provides the Bishop with the information he needs to conduct “Bishop-to-Bishop” checks.

### **ETIQUETTE IN DEALING WITH CANDIDATES**

At this point, the DC is will begin dealing with candidates. There are some important matters of etiquette and courtesy to consider. Failure to follow these simple guidelines will reflect poorly on your parish and the Diocese.

1. Keep careful track of candidates, using a spreadsheet to tell you where the candidate is in the process. It’s poor form to “lose” someone!
2. Stay in touch! The most frequent complaint heard by clergy in a discernment process is, “I haven’t heard from them and I don’t know what’s going on.” When in doubt, err on the side of contacting candidates too often to let them know about your schedule, etc. If a significant period has passed with no need to contact them (such as when you are receiving names), do it anyway just to check in and let them know that the process is on track and you haven’t forgotten them. Clergy will be cooperative with committees that are working and staying in touch, but it is rude not to let them know what’s going on, and it will reflect well on the parish if you stay in touch.
3. Use Email. Clergy expect to correspond by email, and it is a very efficient and inexpensive way to communicate. It also allows you to organize materials on your computer.
4. Maintain confidentiality. This is so important that it merits its own section below.
5. Send candidates a rough schedule (with plenty of “wiggle room”) and do your best to stick to it. It is disheartening for a candidate to hear, “Everything is being held up because we decided to let someone enter their name after the deadline.” If you get behind, let the candidates know what the new schedule is.
6. Remember that candidates are in a discernment process of their own. Everything you say and do reflects on the parish and might influence their

own decision as to whether to remain in the process.

7. Never, never, never cut a candidate without immediately informing them! The Church is rife with horror stories of clergy who have learned that they were cut by finding out (through friends who are also being considered) that the process has moved on without them or by seeing an announcement that someone else has been called.
8. Other than the form letter for cutting someone (included in the form letters at Attachment 45), you do not owe candidates an explanation as to why they are no longer being considered. Candidates who are “finalists” deserve a phone call informing them that they are no longer being considered. You may provide some feedback if you wish, but you should not feel pressured to do so. If you provide feedback and the candidate wants to argue, simply say that you gave feedback as a courtesy, but the decision has been made by the DC. Wish them well and end the conversation.
9. If a candidate drops out of the process, do not take it personally. Typically, candidates, like the parish, are looking at more than one option. A candidate might drop out because he or she has received a call elsewhere (the possibility of which should remind you not to move too slowly!), or has decided that God is not calling them to your parish. Discernment is a two-way street.
10. When the DC or Vestry invites a candidate to interview, the parish should arrange for a hotel room. Although it is tempting to save money by housing interviewees in the homes of, for example, DC members, such a practice will not reflect well on the parish.
11. When you extend a call, no matter how excited you are about it, do not email the announcement (often describing how wonderful the new Rector is) to the clergy you have cut. While they will wish you well, receiving such an announcement will not elicit the same excitement in them!

## **MAINTAINING CONFIDENTIALITY**

Candidates who submit their names are entering into a trust relationship with the DC. The candidate is in his or her own discernment about where God is calling them. Perhaps they will say, “I need to drop out, but this has been very useful because it has helped me realize that I am not finished with my work in my current parish.” Perhaps the candidate will be cut by the DC and will therefore continue to exercise their ministry where they are now. In either case, that candidate’s ministry will be seriously wounded if their parish finds out “through the grapevine” that their priest applied for a position elsewhere. Typically, the priest will then have to deal with feelings by some parishioners of abandonment and betrayal. Often the progress of that parish will be arrested while those

feelings are processed. Sometimes lasting damage can result.

It is therefore vital that the DC treat the names of the candidates with the utmost confidentiality. While the nature of the process and where the DC is in it should always be public knowledge (and someone on the DC should be charged with keeping the congregation informed), DC members should never (even after the call is made) reveal to *anyone* — *even spouses, best friends, or members of the Vestry* — the names of candidates who were not called. This is unquestionably difficult, but DC members who find themselves unable to keep this strict confidence should resign.

In recognition of the difficulty of this task, some DC's ask that spouses be present when the Canon comes to explain the process. This is very appropriate and can be helpful in maintaining marital harmony down the road!

When the DC begins receiving names, the following announcement (or a variation of it) should be placed in the Sunday bulletin and run each Sunday until the call is made:

Our Discernment Committee is [receiving, reviewing, considering, interviewing] names [or candidates] for the position of Rector. We ask that you keep the DC in your prayers. An important part of their work is to maintain confidentiality with respect the identities of the candidates so that those who are not called will not have their ministries damaged by gossip. Mindful that prayer is “responding to God, by thought and by deeds, with or without words,” (BCP p. 856), we ask that part of your prayer life be the discipline of not asking DC members whom they are considering. Thank you, and may God bless you.

## **THE SCREENING PROCESS IN THIS DIOCESE**

The screening of Candidates by the Bishop and Canon for Transition Ministries takes place at two points in the Search Process:

- If the candidate is from another diocese, initial screening with the candidate's Diocesan Deployment Officer takes place when a candidate expresses interest in the position. This is a “Red Flag” check that investigates whether the candidate is subject to ecclesiastical discipline, etc. It does not ensure compatibility with the parish.
- Further along in the process (when there are about eight candidates), our Bishop will call the candidate's Bishop for additional information. You should be sure that this “Bishop to Bishop” check has been done before investing in visiting the candidate or flying the candidate in.
- The candidate's name is sent to the DC with approval to be considered or with a request that the DC remove them from consideration.
- A background check will be made on the top candidate when the DC has made that decision. The background check consists of a criminal records check, a financial check (using reports from credit reporting agencies),

and a questionnaire sent to every employer for the last ten years. If the Vestry and DC request it, the Canon can order background checks on the top two or three candidates, but all background checks are at the expense of the parish. The cost is typically \$300-450 per person (depending on the number of jurisdictions the person has lived in).

The elimination of a name does not automatically suggest anything is wrong with the person. There are many reasons: a priest might have just begun a new work; might obviously not be matched to the Parish; might have family reasons why he or she is not appropriate for the location; might already make a considerably higher salary or might be overqualified for the position. The Canon will not reveal the reason for elimination but the Bishop always has each Parish's best interest in mind.

***It is very important that the DC not reveal to the candidate that he or she is being cut at the request of the Diocese.*** This is an important part of a working relationship based on trust. If candidates know they are being cut at the request of the diocese, they will probably assume (rightly or wrongly) that their Bishop or the Transition Ministry Officer in their diocese was the source of information that lead to them being cut. This could damage the relationship between that priest and his or her TMO and/or Bishop. In addition, it could make bishops and TMOs in other dioceses reluctant to speak frankly and openly with our Diocese.

Other than the screening described above, the Diocese does not conduct reference checks (which the DC should do), nor do we confirm that candidates' resumes are accurate (such as whether a candidate actually graduated from an institution listed on his or her resume). If the DC wishes to, it is welcome to call the registrar of the institution in question and ask whether the candidate graduated.

## **HOW WILL THE DIOCESE PUBLICIZE YOUR OPENING?**

Your parish opening will be listed on

1. The Positions Open Bulletin, a website maintained by the Church Deployment Office
2. The Transitions Ministries Conference website. TMC is an organization of 40 dioceses from North Carolina into New England and the Midwest.
3. The Province IV Deployment Officers' bulletin board. Province IV consists of the Southeast US.
4. The Diocese of WNC website, which has a "Positions Available" page.

In addition, the Canon will "present" your parish opening at semi-annual meetings of TMC and the Province IV Transition Ministry Officers.

## **OTHER SOURCES OF NAMES**

In addition to names from the CDO computer and those generated by the websites and conferences listed above, names are gathered from the following sources:

- members of the congregation (This is an important way members of the parish can participate in the process!)
- friends, relatives, acquaintances of members of the congregation (Encourage everyone to “network” to find priests who might be well-suited for the parish. More names is better!)
- the Bishop, who may recommend clergy
- advertisements placed by the Discernment Committee.

## **TO WHOM DO NAMES GO?**

All names are screened by the Canon before being considered by the DC. Names come from 2 general sources and are initially handled differently:

1. **The Computer Search:** Unfortunately, experience has shown that the list of 40 names will include a high percentage of priests who are not interested in becoming a candidate. It is not an efficient use of the Canon’s time to screen these clergy before anyone ascertains whether they are interested. Therefore, the Canon will give those names to the DC, which writes them to inquire as to their interest. See attachment: Form Letter to Computer-Generated Names.

When a priest responds with interest, the DC informs the Canon, who conducts the initial background screening before the DC considers that person.

2. **All Other Sources** (see above): *If the DC receives a name from a source other than the Canon, it must send the name to the Canon for initial background screening.* When the Canon gives the green light to the DC, it may proceed to the next step (requesting initial information from the candidate).

## **REQUESTING INITIAL INFORMATION FROM CANDIDATES, GIVING A SALARY RANGE, AND TRANSMITTING THE CANON’S LETTER**

Committees typically ask each candidate to submit:

1. a letter of interest (look for whether the candidate uses that opportunity to speak to the committee and discuss why the candidate’s skills might match the Parish’s needs, or whether the candidate simply submits a “please find enclosed” transmittal letter),
2. a Church Deployment Office (“CDO”) profile,

3. a written (or audio on CD) sermon,
4. a resume, and
5. short essay questions (some committees use answering the essay questions as a second step to avoid wasted effort with respect to candidates who will not be considered based on experience, etc.). See Attachment 17: *Suggested Essay Questions with Commentary*. If you vary from these questions, please discuss it with your consultant.

See in **Attachment**: a Form Letter for Requesting Initial Information. Note that it includes the range for salary and housing. It is very important that this information (which many candidates will have from the Positions Open Bulletin) is transmitted to everyone to avoid misunderstandings later.

We ask that you also transmit Attachment 18: *The Canon's Letter to Clergy Considering Positions in the Diocese*. It can be downloaded in pdf. form at **[NEED CITE]** so that you may attach it to an email.

You may, now or later, ask candidates go submit additional information. See Attachment 20: *Gathering Data from the Clergy* and Attachment 21: *Sample Questions for a Candidate*. Be careful, however, not to overdo it. You can dissuade candidates just by making the process to time-consuming. Remember, they have day jobs!

## **READING CDO PROFILES**

Information on candidates will include the priest's Church Deployment Office (CDO) profile. It contains a great deal of information about the priest. "How to Read A CDO Personal Profile" is included as Attachment 19.

## **THE DC's CONSENSUS DECISION MAKING PROCESS**

The DC is ready to consider candidates. It is strongly preferable for the DC to make decisions concerning candidates by consensus. This might require more time and effort, but is well worth it. Consensus consists of three elements:

1. Each member of the DC agrees that, even if the decision would not have been their first choice or preference, they can support it.
2. Each member of the DC agrees that they would be willing to help implement the decision. This is most important in regard to the call of the new rector; each member of the DC agrees that they will help the new rector succeed in his or her ministry.
3. Each member of the DC agrees that they will never speak against the decision. It is disingenuous to agree (even by one's failure to object) to a decision by consensus and then later speak against that decision. If one has a concern or objection, it must be raised during the decision-making process or not at all.

In the event that the DC finds itself unable to make an important decision by consensus, the chair should discuss the matter with the Consultant. While the Bishop will permit a call that is highly favored, even if not by consensus, every effort must be made to reach consensus. It is vital that the decision making process by the DC or Vestry not have residual effects on the new Rector's ministry.

## **REDUCING THE LIST TO 8-12 NAMES: THE PAPER CUT**

At this point, the Committee has not met the candidates but must nevertheless reduce the list. This "paper cut" is probably the most dangerous part of the process because you have to make final decisions with relatively little information. The Committee should approach this task with an assumption that candidates will stay in, and cut only when there is a clear, objective reason to do so (such as skills, experience, years since ordination, etc.).

Some committees prefer to screen as they go, asking the same questions of all candidates as their information comes in. Some prefer to wait until the closing date and then do the initial paper screening so that they can better compare the pool of applicants.

The DC reads (and perhaps listens to) the materials submitted, comparing them with the Parish's own stated needs and qualifications for Rector. The DC continually compares a candidate to the Parish's needs, rather than comparing one candidate to another candidate.

To accomplish this screening, some committees prefer to divide into teams of 2 so that they are reading all the information singly and rating their choices in writing, then discussing their preferences with a teammate and ranking their top 5 choices for the next step of telephone interviewing. See attachment: Candidate Sample Review Form. Some prefer to divide into two teams for this purpose, and some work as a committee of the whole. Again, your DC can choose its own procedure, which might be influenced by the number of candidates. It is imperative, however, that whatever procedure is used, *every candidate is treated equally and no one is doing any telephone pre-screening that eliminates candidates based on their personal preferences*. It is also very important that the business of the Committee be carried out in committee meetings with everyone present. It is inappropriate for members to lobby one another outside the meeting.

Since this is a big task, all members of the DC will be involved, and the DC will meet frequently to winnow the list down. Confidentiality at this stage is critical and should be absolute (even with respect to — especially with respect to — spouses and best friends)! Consensus does not mean that all agree on the merits of a particular candidate, but that for the moment all agree that s/he should remain in the process.

When the DC has made its decisions, *all* candidates should be informed as soon as possible. Attached are form letters for this purpose.

## **PHONE OR VIDEOCONFERENCE INTERVIEWS: CUTTING TO ABOUT 5**

Before you interview candidates, review the non-discrimination canons of the Church and the “Forbidden Questions” (Attachments 22 & 23).

When the DC has agreed to the top names, most committees like to proceed with a telephone (or videoconference) interview. Interviewers ask all candidates a set list of questions. This is important for comparative purposes. Follow up questions may, of course, differ, and the DC might have specific questions for individual candidates based in the information submitted. Each committee person can rate their preferences individually on a separate screening form. (See Attachment 25: *Candidate Review Form for Telephone Interview*.) It is best to conduct the telephone interviews as conference calls with the entire committee present but with only one or two different voices actually asking the questions. After each call, the DC members should write down their individual comments before comparing notes with other DC members. See Attachment 24: *Telephone or Videoconference Interviews*.

When the DC has made decisions, all candidates should be informed as soon as possible. *Be sure to inform the Canon so he can initiate “Bishop to Bishop” screenings.*

## **CHECKING REFERENCES**

After the telephone interviews, the DC should try to get their top preferences winnowed down to five names for site visits and “home interviews.” At this time, the DC should contact the candidate’s references. (See attachment 26: *Questions for References*). Again, consistency is essential. The same questions should be asked about every candidate.

Candidates must give permission to speak with references because checking references, to some extent, reveals that the candidate is in the process.

The final list should have at least five names, since some candidates might be eliminated or some may choose to drop out. The DC chair gives those names to the Canon who keeps the Bishop informed of every step.

Inform all candidates about the DC’s decision regarding them as soon as possible.

*To reduce the risk of losing good candidates to other calls, the DC should move as quickly as possible from this point forward.*

## **SITE VISITS**

When the list is reduced to five, the DC organizes site visits (visits to the priest's parish). Typically, due to scheduling and financial considerations, visits are made by an "Away Team" of three DC members. Site visits can provide valuable information by allowing the Away Team to see the priest in his or her environment, see how the priest conducts worship, hear him or her preach in their setting, perhaps attend an adult education class, and experience the relationship between the priest and his or her parishioners.

Visits are scheduled with the cooperation of the candidate. (You don't want to make a surprise visit and find that he or she is out of town!) Typically, the Away Team arrives on Saturday and meets with the priest's wardens or other lay leaders (with the priest's permission; this, of course, reveals to a limited group the priest's involvement in the discernment process). The Away Team goes to church on Sunday. It is best to go to all services.

There is a covert element to making a site visit. The Away Team must be very discrete. They should not arrive or sit together. If asked, they should say they are in town on business. While the probability that the parish will spot them varies with parish size and location, the team, as a courtesy to the priest, should do all in its power not to reveal itself.

The Away Team should feel free to ask the candidate for hotel recommendations (especially if you are not familiar with the area). It is common for the candidate (and often a spouse) to go to dinner or lunch with the Away Team (at the Away Team's expense).

After the trip, the Away Team members should report on their experiences to the entire DC. Because most members of the DC will not have made the trip, it is helpful to make the report as specific and objective as possible. ("I liked the class" or "I didn't like the class" is not as helpful as commenting on the priest's organization, preparedness, delivery, and rapport.) See Attachment 27: *Site Visits*.

The DC should then reduce the list to not less than three. Remember to inform the candidates of your decision, and *move quickly!*

## **INTERVIEWING CANDIDATES AND ARRANGING MEETINGS WITH THE BISHOP**

The Committee then invites at least three candidates (and possibly spouses) to visit the Parish for "home interviews." (You can expect that candidates will be in discernment with other parishes, which will often also be in the final stages of their process. It is important to proceed with all deliberate speed!) The Parish should pay for travel and hotel expenses. Do not try to save money by having the candidates stay with a DC member.

Candidates should be asked a list of standard questions, as well as questions customized to that person. Again, leave time for questions.

Candidates and spouses visiting the Parish should meet only with the Discernment Committee and may be invited to meet the staff if appropriate. *They are not to be introduced to the Vestry or to the Wardens.* Candidates are not to be introduced to parishioners. Interviews should not be conducted at the church, but the candidate should be given a tour when there will be no (or few) people around. Candidates are not to officiate or celebrate at worship, nor are they to preach to the congregation. The visit is to take place as exclusively as possible between the candidate (and his or her spouse) and the DC. **Again, confidentiality needs to be emphasized at this stage.**

If a spouse accompanies the Candidate, make arrangements for activities for him/her during the interview and remember: the spouse might be calling the shots! Wise clergy give their spouse veto authority.

The DC chair needs to coordinate the candidate's visit with a meeting with the Bishop. This is arranged by calling the Bishop's Secretary (Jessica Guzman) and may take a few weeks of advance planning. The Bishop will not give permission to call any candidate he has not met, and the results of this interview *might* mean that this person's candidacy will be terminated. *It is vital that the DC consult the Bishop's schedule before making travel plans for the Candidate.*

See Attachments 28-33.

## **DC SELECTION OF A FINAL CANDIDATE TO PRESENT TO THE VESTRY AND RELEASE OF OTHER CANDIDATES**

After the interviews, the Discernment Committee selects the **one** name it will submit to the Vestry. See Attachment 34: *DC Selecting the Final Candidate.* The DC submits its final choice to the Vestry with as complete a presentation as possible. The entire DC should meet with the entire Vestry so the Vestry can ask as many questions as needed. See Attachment 35: *Presenting the Name of the Final Candidate to the Vestry.*

The final name brought forth will be either unanimous or *highly* favored; The DC may not present a candidate that has not received a large majority of the DC's endorsement.

When to inform the other candidates that they are no longer being considered is a bit tricky here. The DC should discuss the matter with the Vestry when making its recommendation. If the DC would not favor a second candidate from those being considered, the DC should go ahead and inform the other candidates (by a phone call) that they are no longer being considered. If the DC might favor a second candidate if the first declines, the DC should wait until the Vestry makes a call before informing the other candidates. This matter should be discussed

with the consultant, and points to the need for the Vestry to act expeditiously. It also points out how important confidentiality is at this stage on the part of both the Vestry and DC. This is a time when excitement can run high, and it is very tempting to breach confidentiality. DON'T!

## **BACK TO THE VESTRY TO CONSIDER THE FINALIST**

### **INTERVIEWING BY THE VESTRY AND ITS DECISION**

The Vestry must trust that the DC members have done their best work through the Holy Spirit to select the best candidate available for this Parish at this time. The Vestry's role is not to second-guess the work of the DC, rather to supplement their work with their own due diligence. The Vestry should view the candidate with the assumption that this is the right person. See Attachment 36: *Guidelines for the Vestry during the Final Phase of the Discernment Process* and Attachment 37: *The Vestry's Interview with the Final Candidate*.

The Consultant will assist the Vestry in its interviewing techniques. Note: although the Discernment Committee will have given candidates information about the salary range, it is the Vestry that negotiates the salary and benefits with the Candidate. See Attachment 38: *Caring for Clergy: Some Features of the Letter of Agreement*, and Attachment 39: *Determining Clergy Compensation*. The Vestry may then choose to accept or reject the name given to it by the Discernment Committee.

### **IF THE CANDIDATE ACCEPTS THE CALL**

If the Vestry decides to call the candidate to be its Rector, ***the Senior Warden must first notify the Bishop in writing and obtain final permission to extend the call.*** This can be done by an exchange of emails with the Canon, who is authorized to give the Bishop's permission. With the Bishop's permission, the Vestry in its own name and in the name of the Bishop extends a call to the Candidate. This may be done by a phone call, but the "deal isn't done until the ink is dry," and no public announcement should be made until the Letter of Agreement (LOA) is signed.

The Canon will provide the Senior Warden (in advance) with a copy of a form Letter of Agreement that covers the terms of the financial package along with other benefits such as vacation time, continuing education, sick leave, etc. Parts of the LOA may be negotiated between the candidate and Vestry, but other parts reflect the canons of the Church or diocesan policy and may not be changed. The Canon will provide guidance in this regard. *If any terms are changed, the Canon must approve the LOA before it is sent to the candidate.* Negotiations should include compensation, the terms of moving, the starting date, the date of

the announcement, and any special considerations. See Attachment 39: *Determining Clergy Compensation*.

The final version of the LOA must be signed by the candidate, Senior Warden, Canon (indicating that it has been reviewed), and Bishop. When the LOA has been signed, the Bishop will then telephone the candidate and welcome him/her to the Diocese (or to the new position).

The Vestry then discharges the Discernment Committee and publishes to the Parish its thanks to the DC for its work. (See *Attachment 40: Closure: Tips for Making a Smooth Transition*.) In many parishes, the Vestry hosts a party for the DC as a thank you. It is a good idea for the DC to take its papers to the altar to have them blessed before destroying them. Decommissioning the DC members gives them a sense of completion and the congregation can then take on the authority to accept the new Rector into Parish life. (See *Attachment 41: Liturgy for Decommissioning the DC*.) (Note: In some Parishes the DC continues its work by assisting the Vestry in welcoming and settling the new Rector. The Vestry then thanks the DC and discharges its members after the new Rector has arrived and begun his/her work.)

### **IF THE VESTRY DOES NOT ISSUE A CALL, OR IF THE CANDIDATE TURNS DOWN THE CALL**

This situation would be unfortunate, but many parishes have experienced it and ended up making good calls. The DC must then generate another first choice candidate. It may do this by delivering to the Vestry its second choice out of the original candidates or by asking the Canon for more names. The Vestry may also discharge the current DC and form a new one to continue the process.

If the second choice candidate is not called, the DC will be decommissioned (with many thanks!) and the process will be suspended for additional work with Diocesan staff and the congregation.

### **PREPARING FOR THE NEW RECTOR TO ARRIVE: APPOINTMENT OF A TRANSITION COMMITTEE**

All too often, the leadership of the parish exhausts itself during the interim period, and the new Rector arrives to find a group of worn-out folk ready to pass the baton with a weary, "Here, you do it now." To avoid this, as the process nears completion (such as when the DC is holding personal interviews) the Vestry should organize a Transition Committee to help the rector move (if needed), be welcomed, get to know the congregation, and envision the future together. For example, the Transition Committee might recommend a realtor; ensure that meals are delivered for the first few days if the rector has moved from another city; and organize neighborhood, zip code, committee, or other small group gatherings or dinners so that the Rector can get to know the congregation.

Some members of the DC might also want to serve on the Transition Committee. That is permissible and may be wise in light of the DC's knowledge of the rector-elect.

### **IF YOU HAVE QUESTONS**

If you have questions about this process, speak with your consultant or call Canon Pritchett at (828) 225-6656 (ext. 305). You may also email the Canon at jimpritchett@diocesewnc.org. In order to avoid repetition, please channel questions through the chair of the DC or the Senior Warden.

***Thank you for your service to your parish, the Diocese, and the Episcopal Church. May God bless you in this important work!***