

Revised: 12/6/20

**Congregational Transition Procedures**  
**Diocese of Tennessee**  
**2020**



**Jeremiah 29:11**

*“For surely I know the plans I have for you, says the LORD, plans for your welfare and not for harm, to give you a future with hope.”*

## **A Prayer for the Discernment Process**

*“Almighty God, giver of every good gift, look graciously on your Church, and so guide the minds of those who shall choose a rector for \_\_\_\_\_, 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.”*

(BCP, p. 818)

INTRODUCTION .....	4
LEAVE-TAKING .....	4
LAYING THE GROUNDWORK .....	5
A. Vestry/Mission Council meeting with Bishop Bauerschmidt and/or Canon Howard .....	5
B. A summary of vestry actions during the search process.....	5
C. The appointment of a transition team .....	5
THE INTERIM PERIOD .....	6
A. Formation of a Search Committee.....	7
B. Transition Process Design.....	8
Setting a Budget for Transition Related Expenses & The Search Process	9
FOUR TASKS .....	10
TASK # 1: PROFILE .....	10
TASK #2: NOMINATIONS .....	12
TASK #3: DISCERNMENT .....	14
TASK #4: ISSUING THE CALL .....	18
Welcoming the New Rector.....	19
Appendix A: Some Information Regarding Special Gifts (From Church and Clergy Tax Guide) ..	22
Appendix B: Transition Team & Search Committee Guidelines .....	23
Appendix C: Nomination Form for Potential Candidate for Rector.....	29
Appendix D: SAMPLE LETTERS.....	31
Appendix E: SAMPLE ON-SITE INTERVIEW SCHEDULE .....	35

## INTRODUCTION

The following guidelines describe the vacancy, transition, and search process in The Diocese of Tennessee. This process is designed for parishes, but parts of it may be adapted to mission churches. In the case of mission churches, the bishop appoints the vicar.

The key people in this process are:

- The Right Reverend John Bauerschmidt, Bishop of Tennessee
- The Reverend Canon Jody Howard, Canon to the Ordinary
- The Vestry/Mission Council
- The Transition Team (appointed by the vestry)
- The Search Committee (appointed by the vestry)

***Flexibility, adaptation, and clarity are important in following the diocesan guidelines. Whole steps may be modified or omitted as called for, in consultation with the Canon to the Ordinary.***

Prayer at all levels of parish life (Prayers of the People, Vestry, Search Committee, Daughters of the King, intercessory prayer groups, men's groups, ECW, personal and family prayer) should undergird the process from its beginning. Congregations may consider using the prayer on p. 818 of *The Book of Common Prayer* and/or may wish to compose a prayer of their own.

Most of the work of the Search Committee is done with the aid of Canon Howard, the Diocesan Transition Officer.

## LEAVE-TAKING

This is a time of mixed emotions for congregations. While there is often sadness in losing a beloved priest and perhaps even some hurt and confusion, there is also gratitude for faithful service, shared joy with the departing priest in his or her new adventure, and anticipation regarding the future. Bishop Bauerschmidt and Canon Howard will usually arrange for an "exit interview" with the rector/vicar/priest-in-charge who is leaving. Canon Howard is available for an assessment overview with the Vestry.

The congregation will want to plan a communal celebration so that leave-taking may be experienced fully by as many people as possible. Many congregations will want to give a special gift to the departing Rector and may want to give a gift from the church family rather than encouraging many gifts from individual members. A purse is often given. See *Appendix A* for important information about gifts to clergy.

The parish may want to use "A Service for the Ending of a Pastoral Relationship and Leave-taking from a Congregation" in *The Book of Occasional Services* during the liturgy on the Rector's last Sunday. If so, Canon Howard is willing to be present as the Bishop's deputy, if desired.

During the Leave-taking period, after the departure has been announced, the vestry may wish to appoint a *transition team* which will help coordinate the activities around the leave-taking and farewells offered to the previous priest, and which will take on other duties as the congregation enters the transition period.

## LAYING THE GROUNDWORK

*Note: The process varies between missions and parishes, as well as between parishes of varying sizes and situations. The vestry/mission council will need to determine, in consultation with Bishop Bauerschmidt and Canon Howard, how many elements of the traditional search process outlined below may be helpful in their circumstance. Canon Howard will work with the vestry or mission council to determine the appropriate interview process for their situation.*

*In the document below, vestry and mission council are interchangeable unless a difference in the process for a mission or parish is noted.*

### **A. Vestry/Mission Council meeting with Bishop Bauerschmidt and/or Canon Howard**

When a rector accepts a call to another cure, the vestry, in accordance with the Canons of The Episcopal Church, is asked to accept the resignation of the departing rector. In the case of a vicar or priest-in-charge, both appointed by the bishop, the process is less formal. A vacancy may also occur as a result of retirement or death. Sometime after the announcement of the vacancy, or soon after the departure of the rector, Canon Howard will meet with the Vestry to review the needs of the congregation for clergy leadership during the transition, and the various options available. He will also offer guidelines for the formation of a transition team and subsequently, a search committee (see *Appendix B*).

### **B. A summary of vestry actions during the search process**

- Vestry sets budget for search process
- Vestry issues a call to an interim priest
- Vestry appoints a transition team
- Vestry gives charge to the transition team
- Vestry appoints the search committee
- Vestry gives a charge to the search committee
- Vestry approves compensation package for new rector
- Vestry approves the parish profile
- Vestry approves OTM Community Portfolio
- Vestry acts on recommendation of Search Committee and votes to call a new rector after interviewing one or more candidates.

### **C. The appointment of a transition team**

## THE INTERIM PERIOD

The interim period between the departure of one priest and the call of another can be a time of anxiety, but also of creativity and imagination. Depending on the choice of the vestry to engage in a traditional search or to ask the bishop to appoint a priest-in-charge, the interim period could take different shapes. Neither decision ensures a timeline, though generally a traditional search will take more time.

Regardless of the choice of the vestry, an interim period within the congregation will revolve around five focus points, all under the heading of coming to grips with who you are as a congregation right now:

### Clarifying Identity



The tasks of interim clergy, as well as the vestry and other parish leadership during a time of transition will revolve around the above points. Reflection on these points assist the congregation in answering the questions: Who are we? What is God calling us to do? Who are our neighbors?

Stages within the interim period:

- Preparation
- Search
- Call
- Welcome

During the **preparation phase**, the congregation engages in the work of self-reflection, determines whether to call an interim or to engage supply clergy, and begins the formal processes of transition.

- 1) If it has not already done so during the Leave-taking period, The Vestry may appoint a **transition team** made up from a combination of one or more vestry members and parishioners. They will take on the preparatory tasks that should be done prior to

commencing a search, and will have ongoing responsibility to see that social and community building activities in the congregation continue during the interim period.

- 2) The areas of responsibility for the transition team are:
  - a. Taking the lead in offering support to the departing Rector, the Interim, and eventually the new Rector and his or her family.
  - b. Ensuring the social and community building activities continue throughout the interim period.
  - c. preparing for & overseeing the self-study and congregational surveys.
    - i. A survey shouldn't only or even primarily ask questions about what sort of clergy person the congregation desires for their next rector. Instead, questions should focus on the what mission is ongoing in the parish, and what sorts of mission and engagement parishioners desire to engage in in the future.
    - ii. This would also be a good time to do a spiritual gifts inventory and other discipleship tools within the congregation.
    - iii. There are currently two professional surveys I recommend, the Congregational Assessment Tool (CAT) by Holy Cow Consulting, and the US Congregational Life Survey (administered out of the PCUSA offices in Louisville).
  - d. Updating the web site, if needed.
  - e. Determining if there are any tasks related to the buildings and grounds (including any rectory) that have been deferred and ought to be addressed before a new priest is called.

## **A. Formation of a Search Committee.**

After the completion of the self study, that provides a good deal of the information for the parish profile, the transition team will hand that information over to the search committee, who will then guide the parish information sessions (large group) and small group conversations in the parish among the membership, and do the work of bringing the information into a coherent profile, making sure it is put on the web site etc.

One way to look at it: the transition team lays the groundwork for the search, and continues supporting the transition. The Search Committee takes the baton from the Transition Team as regards the details of the search itself.

Below are a few things to keep in mind:

1. *In smaller congregations the vestry itself may want to function as the search committee.* Whether or not this is practical depends on the parish, and should be considered in light of the purposes for which a search committee is formed in the first place.
  - A. Search committees are formed with several purposes in mind:
    - To take the burden of delving deeply into the backgrounds, gifts, and talents of candidates off of the vestry which is occupied with seeing to the tasks of parish operation during an interim period.
    - To narrow the number of candidates to a manageable number, presenting the vestry with one or two recommendations from among those who have applied.
    - To serve as a point of contact with the candidates and the parish—being representatives of both the parish and the wider community to the potential rectors.
    - To ensure a diversity of voices and a broad representation of the congregation.
2. If the vestry feels that they have the time to perform the major tasks of the search process themselves, that's an option, but they should ensure in doing so that all of the goals behind the traditional search committee are met. That may mean that the vestry (or a portion of the vestry) plus some other representatives of the congregation are called upon to oversee the search and interview process.

The Search Committee should be as broadly representative of the parish as possible and the Vestry should choose the committee with this in mind. The chair of the Search Committee may be designated by the Vestry or may be elected by the committee itself. As a rule of thumb, the size of a Search Committee may be roughly equal to the size of the Vestry (nine to thirteen members). At least one Vestry member—preferably more—whose terms will continue into the next rectorship should be appointed to serve on the Search Committee. As soon as the Search Committee has been formed it should be installed in a regular Sunday morning worship service (see, *The Book of Occasional Services*, Commissioning for Lay Ministries in the Church).

## **B. Transition Process Design**

As early as possible after the *Transition Team* has done their work and a Search Committee has been appointed, a meeting of the Vestry **and** Search Committee should be held with Canon Howard so that the expectations for the search process are clear. At that meeting, the entire *Congregational Transition Procedures Handbook* will be reviewed.

The Vestry should provide clear guidance to the Transition Team and Search Committee. Items of interest for the Transition Team might be: Will there be a website redesign? How many bids should they seek? What is the budget for parish social activities during the transition? Will they be expected to put on such events, or oversee the work of other committees/commissions of the church that ordinarily perform those functions?

For the Search Committee, clarifying the expectations for the search is very important. For example: How many names does the vestry wish to have for their final consideration? Does the Vestry want to conduct the final interview(s) when the candidate(s) visit the church, or is that part of the Search

Committee's charge? The Vestry's expectations need to be outlined in a written charge to the Search Committee (see *Appendix B* for a sample, p.21).

## Setting a Budget for Transition Related Expenses & The Search Process

A transition & search process budget should be developed and approved by the Vestry to include such expenses as:

- parish survey/questionnaire design.
- printing,
- brochures,
- travel expenses of search committee members and prospective Rectors and spouses
- Relocation expenses, and the expense of background checks on the final candidates (~\$250 for each background check). (See *Appendix B*, for other items to be included in the search budget.)
- The Vestry shall be clear about the budgetary restraints on the search process and communicate those to the Search Committee.

The Search Committee meets on its own to organize itself. As soon as possible sub committees are to be formed to deal with various tasks, such as:

- Devotional/spiritual
- Presentation instruments, such as constructing a brochure and, and preparing the OTM Community Portfolio for posting on line
- Hospitality (For visiting candidates)

The Search Committee should develop a tentative timeline (there's a sample in appendix. It is important that assumptions about the search be discussed and decided at an early stage. A clear policy should be developed between the Search Committee and the vestry which ensures as much open and continuing communication with the parish as possible, while **maintaining confidentiality, even from spouses, about specific clergy who will be under consideration.** This confidentiality within the committee and vestry should continue until a candidate has accepted the call and includes the identity of the candidates as well as privileged information that the Search Committee receives or develops on each of them. **Any break in the confidentiality of privileged information can be seriously damaging not only to the candidate and the candidate's own ongoing ministry, but also to the congregation, Search Committee and Vestry, and can lead to disastrous polarization within the congregation.**

The degree of information that the search committee will share with the vestry in this process should be clarified from the beginning. It is unhealthy for the vestry to micromanage the work of the search committee if they have appointed one to the work. If the vestry wants to be hands on, they should not have appointed the committee to begin with. At the same time, the older model of a complete wall of separation between vestry and search committee made more sense when parishes were receiving long lists of candidates, and vestries might have advocated for one that the search committee deemed inappropriate or not a good match for the parish. Just as the parish—including the search committee—will need to abide by the wisdom of the vestry in the final call, the vestry should trust the wisdom of the search committee earlier in the process as it narrows down the candidates.

## FOUR TASKS

The transition & search process can appear to be a formidable enterprise. It can stretch on for a year or more, depending in part on the organizational skills of the Search Committee leadership, their own sense of urgency and the reliability of those who take on various assignments, *and most significantly timing and the availability of clergy appropriate to the call*. Generally, the search process takes from nine to eighteen months. The goal ought to be to take as much time as necessary to do a thorough job while not wasting time.

While the process can seem complicated, there are really only 4 major tasks:

- **Developing a PROFILE**
  - ❖ Performing self study (Transition Team)
  - ❖ Updating Web site (Transition Team)
  - ❖ Determining compensation (Vestry/Finance Committee)
  - ❖ Developing & Posting Profile (Search Committee or Vestry—always with vestry approval)
  - ❖ Filling out OTM Profile (Search Committee or Vestry, with vestry approval)
- **Securing NOMINATIONS**
  - ❖ This means disseminating the profile (Search Committee)
  - ❖ Posting the OTM (Search Committee)
- **Devising a DISCERNMENT process** (Search Committee & Vestry)
- **Issuing a CALL** (Vestry, based on candidates provided by the Search Committee, if applicable)

## TASK # 1: PROFILE

### A. Parish/Leadership Survey (transition team)

The first task of the transition team is to provide a comprehensive self-study by the congregation. In most instances the transition Team will want to spend a good deal of time and effort on this part of the process. At a minimum, this self-study will include a gathering of data from the parish and its membership about:

- The parish
- The community
- The kind of spiritual leader it feels is needed

This gathering of data may include a parish survey, an open parish meeting, and/or small focus groups where members respond to specific questions and have opportunities to share their hopes/concerns.

Canon Howard can provide sample parish surveys. You are encouraged to work with a company that has experience giving surveys. Using professionally vetted questions can be helpful. The transition team and vestry may also develop their own version. Recommended tools include the Congregational Assessment tool (CAT) from Holy Cow Consulting, or the US Congregational Life

Survey. Vestries or Transition Teams are encouraged to visit the US Congregational life Survey site (<http://www.uscongregations.org/>) and the CAT website, [www.holycowconsulting.com](http://www.holycowconsulting.com), and to consider which tool may be the most beneficial and fitting for their community. Both services have trained consultants who can offer interpretations of the survey data to the vestry and search committee.

**Surveys rarely turn up major surprises and unless they are done carefully (often with professional help) they generate incomplete information.** They can be useful, nonetheless, in giving everyone in the congregation an opportunity to contribute their thought, and their desires for the congregation.

## **B. Hand off to Search Committee: Preparation of Parish Profile/Brochure**

In the past ten years, fewer parishes have focused on printed profiles and mailings, opting instead to expend energy re-designing their website and incorporating insights and information from the parish surveys. Often there is a PDF of the profile available on the web site.

Adding the data collected from a survey, to open parish meetings, and/or small group conversations, along with a brief history of the parish, the current budget and financial status, and a compilation of demographic information about the larger community, comprises the raw material for the parish and community profile. The profile should also list the staff members, Vestry members and members of the Search Committee. The final product may be a collection of materials and may include information in narrative form, photographs, graphs, information on a website, and other important information collected from within the parish and the larger community. This is the place to use creativity, color, and imagination to tell the story of your parish.

The parish profile/brochure should reflect the character of the congregation both in content and in format. A brochure of some sort or another is almost always produced as one way to tell the congregation's story and is invaluable in future communications with potential candidates.

The first task of the search committee will be to organize the open parish meetings (large group) and the small group meetings where hopes and concerns of parishioners are solicited. Such data will be largely "impressionistic" and will need to be interpreted by the Search Committee, but can be a useful tool in involving members of the congregation and allowing everyone an opportunity to be heard. Usually, a member, or members of the Search Committee facilitate these meetings.

To prepare for these meetings, the search committee will draw up a list of specific questions to be asked of all the focus groups, arrange the times for the groups to meet, and facilitates the group conversation. Group members might be asked to share hopes and concerns, in addition to specific questions. Canon Howard can provide a model for the focus groups and work with facilitators to prepare them ahead of time.

The small group meetings can be a good place to discern who might be a good person to put on the search committee.

**As soon as a draft of the profile/brochure is ready, a copy should be sent to Canon Howard and Bishop Bauerschmidt to review before posting or printing. The profile/brochure should be ready before any names are placed in nomination.**

The profile/brochure will need Vestry approval before printing or being posted on the parish website. The profile/brochure should be posted on the parish's website.

## **C. Office of Transition Ministry (OTM) Community Portfolio**

For the Rector position to be posted on the computer database at the Office of Transition Ministry (OTM) in New York, the Search Committee will need to develop an OTM Community Portfolio, the form of which Canon Howard will share with the Search Committee. The Community Portfolio is completed and posted on the OTM website in order for potential candidates to learn about the open position, and to provide yet another resource to clergy who might consider the position. Canon Howard will enter the Community OTM Portfolio information. The OTM Portfolio includes parish statistics, compensation information, desired skills in the new rector, names and dates of prior rectors, and responses to eleven narrative questions.

The OTM Portfolio will also need Vestry approval before it is posted on the OTM website.

Once the Parish Profile is posted on the parish's website, and the OTM Community Portfolio is posted on the OTM website, the Search Committee is ready to begin receiving nominations. Usually, the Search Committee receives nominations for about 8 weeks.

## **TASK #2: NOMINATIONS**

### **A. Sources of names**

1. Parish Suggestions
2. Suggestions from diocesan clergy and/or laity
3. Self Nominations
4. The Bishop's Office
5. The Office of Transition Ministry (OTM)

### **1. Parish Suggestions**

Unofficially, the nomination process may have begun almost as soon as the vacancy is announced, but it is important to be intentional about congregational participation in the nominating process. In almost every congregation there are parishioners who are eager to place names in the process and some mechanism should be provided whereby this can be done. For instance, a box may be placed at the back of the church shortly after the members of the Search Committee have announced that they are receiving nominations. The committee can draw up a nomination sheet or simply request that the names of potential candidates be written on a slip of paper and placed in the box. **The committee makes clear that all such names put forward are kept in confidence.** The chair of the Search Committee retrieves these suggestions and forwards the names to Canon Howard. (See *Appendix C*, p. 23, for a sample nomination form.)

### **2. Suggestions from diocesan clergy and laity**

Canon Howard e-mails the clergy of the diocese when a parish's profile and OTM Portfolio are on line, and the Search Committee is ready to begin receiving names. This information is also included in the weekly Bishop's Blast, which goes to both clergy and laity in the diocese.

### **3. Self Nominations**

Clergy learn about openings in the diocese in a variety of ways. It may be through word of mouth, the OTM website, the diocesan website ([www.edtn.org](http://www.edtn.org)) or an advertisement in *The Living Church*. Clergy should submit their names directly to the Diocesan Transition Officer (the usual route). If clergy submit their names to the Search Chair, the chair keeps these names in confidence, and submits them to Canon Howard along with any suggestions from parishioners. These clergy should not be seen as “applying for the job” but, rather, as expressing their interest in learning more about the parish.

### **4. The Bishop’s Office**

Canon Howard keeps a file of potential candidates for positions in the Diocese of Tennessee who have come to his attention or the attention of the Bishop. Bishop Bauerschmidt and Canon Howard may have names of potential candidates they think may be a good match for a congregation.

### **5. The Office of Transition Ministry (OTM)**

Many clergy have an Office of Transition Ministry Portfolio. Clergy are strongly encouraged to update their OTM Portfolio at least every three years. Clergy who are considering a new call may become aware of an opening through browsing the OTM Community Portfolios.

## **B. The Official List of Candidates**

Nominations from all of these sources are given an initial reference check by Canon Howard and approved by Bishop Bauerschmidt for submission to the Search Committee. Before placing any clergy person on the official List of Candidates, Canon Howard contacts the Diocesan Transition Officer of other dioceses for a reference check on each of the potential candidates, and shares this information with Bishop Bauerschmidt. Some names suggested may not be forwarded to the committee for a variety of reasons. Because of the sensitive and confidential nature of the information, neither Canon Howard nor Bishop Bauerschmidt is able to give reasons when names are removed. Some of the criteria used by the Bishop’s office are:

- Length of tenure in present ministry
- Potential mismatch of ministry gifts
- Screening for misconduct
- Lack of adequate training
- Timing issues of a personal nature

Canon Howard contacts each potential candidate before placing him or her on the official list. If a potential candidate is not interested in entering into discernment about the open position, Canon Howard removes his or her name from the list of official candidates. Thus, the official list of candidates only includes the names of clergy who are interested in discerning whether or not they may have a call to that parish.

When the Official List of Candidates is brought to the Search Committee, the names of the candidates will be arranged alphabetically (with no indication as to the original source of the nomination) so that all candidates may be considered equally.

## **C. Policy regarding Assistants, Interims, & Associates**

Assistants, Interims, and Associates may not be considered as candidates for rector of the congregation in which they are serving.

**At this point, nominations are usually closed.** There may be exceptional instances where Canon Howard asks the Search Committee to consider additional names.

## **TASK #3: DISCERNMENT**

### **A. Presentation of candidates and first discernment**

This discernment phase will include a visit from Canon Howard with the Search Committee and the presentation of the official list of candidates. OTM Portfolios and resumes will be used during this phase. Canon Howard will explain how to read the OTM Portfolio, and review a couple of portfolios. The portfolio provides personal and financial data about each candidate, work and educational history, ministry skills and experience, and responses to eleven narrative questions. The resume gives opportunity for the candidate to supply additional information that may not be in the OTM Portfolio. In order to consider all candidates equally in the initial screen of candidates these two documents are the only documents used.

After the official list of nominees is presented to the Search Committee, members are given one or two weeks to study the OTM Portfolios and resumes. The committee then meets and discerns whether there are nominees who will not be contacted at all. However, it is best to “cast the net wide” at this initial stage. If there are nominees who will not be contacted, the Search Committee should write a letter to these nominees, thanking them for their willingness to enter the discernment process, and letting them know that they are no longer under consideration. (See *Appendix D*, p. 24, for a sample letter to those not continuing in the Search Process.)

### **Mailing and second discernment**

The second discernment phase begins with a mailing or e-mailing from the committee to each candidate being considered. This mailing or e-mailing should be sent to all candidates at the same time, and should include a description of this early stage of the search process. The mailing **may** include the following:

1. A Cover Letter

This is a letter from the Search Committee chairperson to every priest the Search Committee wishes to contact stating that his or her name has been received for inclusion in the search process. The letter should request that the candidate confirm by return mail or e-mail his/her willingness to be considered. If the candidate is still willing to be considered, he/she needs to send a list of personal references to the Search Committee by a specific cut-off date (after which the priest will no longer be in consideration). A suggestion is to ask for three clergy references, and four lay references, one of them being a staff member. (See *Appendix E*, pp. 25-27, for sample cover letters.)

2. The Parish Profile/Brochure

- a. The Parish Profile/Brochure may be sent in whatever format the committee chooses to present it.
3. Letter of Interest and Questions
    - a. The committee may ask the candidates to write a letter stating why they are interested in discerning a call to the parish. The committee may also ask no more than three or four questions for the candidate to respond to. These questions should relate to the responsibilities listed on the OTM Community Portfolio, seeking evidence from the candidates of skills in these areas. The committee should limit the respondents' answers to each question to a specified length. Brief answers are the most helpful. (See *Appendix E*, pp.25-27, for sample questions.)
  4. Other Materials
    - a. The committee may enclose other materials which may be helpful in acquainting the candidates with the parish and the community, such as brochures from the Chamber of Commerce, or other similar resources.
  5. A Return Post Card
    - a. If a mailing is done, it is advisable to enclose a response card whereby the candidates may indicate that they have received the materials and whether or not they are still willing to be considered as a candidate. For those continuing in the Search Process, a letter of acknowledgement should be sent explaining the time line for the next step, and when he/she can expect to hear further as to his/her status in the process.

## **B. Variety of tools and next discernment**

Using the OTM Portfolio, the resume, the letter of interest, and responses to the questions sent in the initial mailing or e-mailing, the committee is now ready to employ a variety of discernment tools. A Search Committee may use all of the tools suggested below, or a few of them. The committee may come up with tools of their own design in their quest to assess a healthy match of a person's future ministry with the parish. Some of the more commonly used discernment tools are listed below:

### **1. Parochial Report Data**

The Episcopal Church website provides a summary of Parochial Report Data for all Episcopal Churches. This data is a helpful tool (but only one indicator among many) of the health of congregations. If useful, the Search Committee may research the Parochial Report Data for the congregation where a candidate has served or is serving.

#### **To access this information:**

Go here: <https://bit.ly/37HJFce>

### **2. Reference checks**

The Search Committee will want to contact (usually by phone) references supplied by the candidates. If references are approached in a friendly, non-threatening manner, the information received is generally invaluable. In addition to general questions that may be asked in regard to all candidates,

attention also should be given to information that seems ambiguous or incomplete in a candidate's profile or resume. **Those making reference calls should not ask a candidate's references for other references without the knowledge and consent of the candidate.**

**It is not appropriate for the Search Committee to make reference calls to Bishops or to Diocesan Transition Officers. These reference calls are made Bishop to Bishop, and Transition Officer to Transition Officer.**

### 3. **Electronic interviews**

Most Search Committees will want to take advantage of this inexpensive way of making contact with candidates. In order to conduct electronic interviews via Zoom or Skype or a similar service, all you need is an appointment with the candidate, and a computer with good internet access, a web camera and microphone, and a set of questions. Generally a subcommittee of three to four people, plus a scribe, conducts the interview. It has become common to record interviews for the later viewing of the search committee as a whole, after which the video should be destroyed/deleted. The permission of the candidate should always be sought in advance to record the interview. If the committee wishes to record the conversation (usually for the benefit of a missing member of the committee) permission must be obtained from the candidate in advance. The thoughtful questions should come out of the Parish Profile/Brochure and the information supplied by the candidate.

### 4. **Sermon Videos, Podcasts**

The committee may request electronic versions of sermons from the candidates as well. These may be listened to or viewed by the entire committee at the same time, or rotated among the members of the committee to listen to at their own convenience. Many larger churches have podcasts of sermons available on their websites, or on the internet.

### 5. **Site Visits**

Site visits by members of the Search Committee are another possible discernment tool. While cost may be a factor it should not be the only motive in deciding whether or not to visit clergy in their own churches.

**If visits are made,** the Search Committee usually divides up to accomplish this task. Candidates should be contacted ahead of time for their advice and permission about when to come and how to best to take advantage of the visitation. A visitation report should be made for the Search Committee by the visitation team, the format of which should be decided ahead of time by the whole committee. **The report format should be the same for each candidate.**

Visiting members of a Search Committee need to exercise prudence in order to maintain the confidentiality of the candidate in his or her own congregation. Thus, the visiting members of the Search Committee should not arrive together, or sit together at the candidate's parish worship service. If greeted or welcomed by members of the parish, it suffices to state that one is in the area on business, which is true.

## **C. The Final List**

On the basis of the information gathered through all of the discernment tools and the accompanying impressions, the Search Committee then meets to decide which candidates they wish to invite to the parish for a visit including an extensive interview. **Those no longer under**

**consideration should be advised as soon as possible, with the committee thanking them for their time and willingness to be in discernment about the position.** (See *Appendix D*, p. 24, for a sample letter to those not continuing in discernment.) Open communication at this stage is very important to allow the candidates no longer under consideration to put that decision into perspective. While confidentiality is essential to the entire process, secrecy within the Committee and with the candidates almost always breeds undue and useless confusion, anxiety, and anger.

This phase of the search process is designed to produce a final list of candidates. The Search Committee chair conveys this list to Canon Howard, and asks him to request a background check on each of the final candidates. This background check is run by Oxford Documents and costs about \$250 per candidate. The process usually takes 6-8 weeks, and the cost of the background checks is borne by the parish.

**Canon Howard will expect to meet with the Search Committee and/or Vestry at this point to do a training session regarding interviewing. He will want to meet with whichever body is conducting the final interviews.**

#### **D. Face to Face Interviews and Final Discernment**

The last phase of the process is in many ways the most fun and the most demanding. This involves a visit to the church by the candidate or candidates who constitute the final list. Generally this includes no more than five candidates, and usually no more than three. This phase is time consuming and potentially costly but is also the most rewarding.

At the full expense of the parish, the final candidate(s) and spouses(s) are invited to the parish for a face to face visit and an extensive interview.

**If a candidate is not canonically resident in the diocese, arrangements should be made for a meeting with the Bishop at his office during this visit. Kim Jones, (kjones@edtn.org, 615-251-3322) should be contacted to determine Bishop Bauerschmidt's availability to meet with the candidate before any travel plans are made.**

At this point, the Vestry usually becomes a much more active and visible participant and presence. Until this point, the Vestry's primary contact with the Search Committee has been through the Vestry members who are on the Search Committee. Prior to the visit(s) of the candidate(s) and spouses(s) the Vestry will need to be supplied with informational materials, including a copy of the OTM Portfolio, the resume, the letter of interest, responses to questions sent to the candidates, and the visitation reports, if visitations have been made. The Vestry may have decided to conduct the formal interview during the visit, or the Vestry may ask the Search Committee to conduct the formal interview, and present only a single name to the Vestry as the Committee's recommendation. If the Vestry decides to ask the Search Committee to conduct the formal interview, the Vestry should nevertheless be included in the social time, and worship time during the candidate's visit. **This decision of the Vestry should be clearly stated in the Vestry's Charge to the Search Committee at the beginning of the process.**

Please be aware that the final candidates can, and sometimes do, turn down a call. The interview itself is as much one by the candidate of the parish as it is one by the parish of the candidate. During this visit an opportunity for the candidate to visit the community and possibly meet with the church staff is arranged, and a schedule agreed to by the candidate and the Search Committee will facilitate this. Here are a few things that are normally included in a candidate's visit:

- **Worship**  
The candidate may be invited to celebrate the Eucharist or lead a Daily Office and share a brief homily as part of this visit, **provided that the service is only for the Search Committee and Vestry. This celebration is not to be considered an “audition” but is an effort to place the visit in the context of worship.** The committee might wish to use readings from “Various Occasions” in the Book of Common Prayer (pp. 927-931), or ask that the readings from the prior Sunday be used. In either case, this information should be communicated to the candidate at least a week prior to the scheduled visit.

It is generally helpful to schedule the worship time just prior to the formal interview, so that all have opportunity to be prayerful and centered during the interview.

- **Social Time**  
Most often the Search Committee and the Vestry gather for a social time with the candidate and his/her spouse. This usually includes a meal away from the church (a home or a private room at a restaurant) and perhaps wine and cheese. This is an informal time to get acquainted, and is not a time to grill the candidate.
- **Formal Interview**  
Canon Howard will provide the Vestry and the Search Committee Chair with a useful guide for interviewing. The Chair is in charge of distributing the guide to the rest of the committee (and/or the Vestry). He will also meet with the Search Committee (and/or the Vestry) prior to the interviewing process to go over this document. The spouse should be invited to attend the formal interview, and may accept or decline the invitation. Questions for the interview come out of the OTM Community Portfolio, the parish profile or brochure, and the written materials from the candidate.
- **A Tour**  
A tour of the church and the community is included for the candidate and spouse. This might include a tour of different real estate in the area, as well as schools, recreational facilities, shopping areas, libraries, cultural or historical sites, etc.
- **Hospitality**  
It is best to provide a hotel room for the candidate and spouse rather than lodging in the home of a parishioner. This allows the candidate and spouse to talk freely with one another about their discernment of a possible new move and ministry. Please remember to allow the clergy and spouse (and sometimes other family members) sufficient time for rest during such a visit. Small gestures of hospitality are much appreciated and a sign of welcome, such as flowers or a basket of fruit in the hotel room.

The manner and tone in which visits and interviews are conducted speaks volumes about the identity of the parish.

## **TASK #4: ISSUING THE CALL**

### **A. Vestry discernment and notice to Bishop**

Following the visit to the parish of the candidate(s), the Vestry determines a time and place for a meeting where the agenda will be the election of the new Rector.

- **When the vestry elects the rector, the senior warden should immediately contact the bishop for verbal approval before a letter of call can be extended to the clergy person.**
- A formal letter will be sent to the bishop officially informing him of the election and becoming part of the clergy person's file. This letter should be signed by both wardens and note the time and place of the vestry meeting that elected the new rector.
  - A scanned copy of the physical letter may be sent to the Canon-to-the-ordinary at JHoward@edtn.org, who will pass it on to the Bishop. ***The original physical letter should still be mailed. A copy of the letter should be maintained in the records of the vestry.***
- The clergy person should be given sufficient time (not exceeding 10 days) to accept or reject the call, and should communicate such to the vestry verbally and then in writing.
- No public announcement is to be made until an agreement is reached in principle and until the timing of the announcement has the approval of the Bishop's office, the newly called Rector/Vicar, and the vestry.

## **B. Letter of Agreement**

### CLARIFYING TERMS OF THE CALL

The wardens and Canon-to-the-Ordinary work with the rector-elect to define the terms of the call leading to a letter of agreement (a standard template of a LOA is available from the bishop's office), which is reviewed and acknowledged by the bishop. Then the public announcement is made, and a celebration of new ministry is planned.

As soon as practical the Vestry should request Canon Howard to provide the form for a Letter of Agreement. This form includes diocesan policies regarding times of work and leave, compensation, mutual ministry review, etc. The Letter of Agreement must be acceptable to both the priest and the vestry, and approved by the bishop. A copy of the Letter of Agreement, approved and signed by Bishop Bauerschmidt, is kept in the priest's file in the diocesan office. One copy is kept by the priest, and one by the parish.

***Candidates not called should be so notified only after a call has been extended and accepted unless it is clear that none of the remaining candidates are acceptable to the Vestry.***

## **C. Priest's second visit**

The parish is also responsible for a second visit by the priest (and family) to find housing (if there is no rectory), to negotiate and/or sign the Letter of Agreement, and to visit the Diocesan Office to process other matters (insurance, pension, etc.)

## **Welcoming the New Rector**

### **A. Moving Arrangements**

Parishes are responsible for moving expenses and should make every effort to facilitate the moving and arrival of a priest and family.

## **B. Family Inclusion**

A special Transition Committee should be assigned to work with the new priest and the spouse in getting established. (Some members of the Search Committee might serve on the Transition Committee.) Small groups might call on the spouse to invite him/her to various parish functions, and to help him/her get acquainted in the community.

The same would be true for children. Children of the same ages should establish contact and begin to make them feel comfortable in their Church School environment, as well as in their regular school environment.

## **C. Celebration of a New Ministry**

As soon as feasible, the priest and the Transition Committee should make arrangements with the Bishop for the “Celebration of a New Ministry” (BCP, pp. 559-564). This liturgy should be scheduled on a Saturday or week night so other clergy in the diocese may be present and show their support.

## **Ending the Search Process**

The search committee will spend many hours on behalf of the congregation, and it is important, when its job is complete, to acknowledge its job formally. The committee might be recognized during worship, and should be publicly thanked by the congregation. It is helpful for committee members to get together in some sort of exit activity in which they reflect on the work they have done and their own participation in it. They should also bring together and destroy the personal information they have about all candidates and the search process. In addition, the committee should have a celebratory event, possibly a dinner with the new rector, and give thanks for the opportunity for service to the congregation, the ties they have made with one another, and the work that God has helped them through.<sup>1</sup>

## **D. *Ministry, Leadership, and Mission***

The new Rector/Vicar will be expected to participate in a yearlong diocesan program called ***Ministry, Leadership, and Mission*** which is designed to better equip the clergy person in making this transition, and to encourage collaborative ministry. ***Ministry, Leadership and Mission*** meets monthly (except for July and August) for the purpose of strengthening relationships through prayer, open conversation, and critical reflection. Parishes are expected to encourage and support their clergy’s participation.

## **E. Mutual Ministry Review**

As set forth in the Letter of Agreement, the Rector (or Vicar) and the Vestry are expected to come together annually and execute a review of Mutual Ministry. This review usually takes place sometime between the 6<sup>th</sup> and 12<sup>th</sup> months of this new ministry, and forms the basis for subsequent Annual Mutual Ministry Reviews. This first review might begin with the Parish Profile/Brochure developed during the search process. Canon Howard will provide a resource published by the Church Transition Office, “Living Into our Ministries” which is a helpful guide to mutual ministry

---

<sup>1</sup> Beginning Ministry Together: The Alban Handbook for Clergy Transitions, by Roy Oswald, James Heath, and Ann Heath (Washington D.C.:The Alban Institute, 2003).

review. He is also available to be a facilitator at the mutual ministry review process. It is suggested that the first Mutual Ministry Review be facilitated, and that subsequently they be facilitated every third year.

## **Appendix A: Some Information Regarding Special Gifts (From Church and Clergy Tax Guide)**

Many congregations would like to present a purse to the departing Rector as a way of saying “Thank You.” This is always appropriate since it allows all members of the congregation to express their gratitude without regard to their ability to give something significant and it discourages the giving of many smaller (and sometimes impractical) gifts. There are some tax consequences, however, that should be clearly in mind.

- Special gifts made to clergy by the church out of the general fund should be reported as taxable income on the clergy person’s W-2.
- Personal gifts made by individual members of the parish to the clergy are not reported as taxable income (though they are not deductible by the donor).
- Special gifts given through the church but not recorded as tax-deductible donations may qualify as non taxable income provided that donors are advised in advance that gifts will not be considered tax-deductible donations.

## Appendix B: Transition Team & Search Committee Guidelines

### THE TRANSITION TEAM

The purpose of the transition team is to focus on the initial tasks that must be completed before a search can begin. It is **task oriented**, while the Search Committee involves more intentional discernment. So, then thinking of who would be good for this team, consider folks who can “get things done” but do so in a way that demonstrates concern for others’ thoughts and opinions.

The Transition Team should consist of between 5-7 members, and include no more than one vestry member. One of its tasks is to take responsibilities off of the vestry so that the vestry can focus on keeping the congregation running smoothly, and addressing any anxiety or conflict within the congregation.

The Vestry should clearly outline the tasks they expect the Transition Team to accomplish before a search begins, and before a Search Committee is appointed. In listing and outlining the tasks, the vestry is giving the Transition Team a mandate to accomplish them. Such tasks might be:

1. If formed before the departing priest has left, the Transition team may take the lead on planning appropriate leave-taking activities. Throughout the Transition process, the Transition team will see to it that regular community building and social activities continue in the Congregation.
2. Determining which survey tool for a parish survey is best.
3. Interview and recommend web designers for a website update if needed.
4. Gather information about facility needs that should be addressed during the transition period before calling a new priest, and communicating those to the Vestry.
5. Get cost estimates for all tasks for the transition and search period as outlined by the vestry, for example: surveys, website updates, printing of a parish profile (if desired) etc.
6. Oversee the gathering of information that may be useful in the writing of a parish profile, such as:
  - 6.1. History of the Parish (including previous clergy lists)—see sample profiles for potential uses.
  - 6.2. Copy related to ministries of the parish.
  - 6.3. Description of parish demographics and finances.
  - 6.4. Description of local community, schools, chamber of commerce type information.
  - 6.5. Determine what aspects of this information should be included in a website refresh.

Once the above information has been compiled and various tasks completed (or scheduled for completion) the Search Committee should be formed and tasked with overseeing the parish large group meetings, small group conversations/Holy Conversations that will flesh out the profile.

## THE SEARCH COMMITTEE

The search committee is a creation of the vestry and works for and on behalf of the vestry. The committee may be formed and schedule/layout their work before the transition team has completed all of its tasks, but their work will really begin once the transition team has handed off the data from the parish survey's and small group conversations.

The senior warden, on behalf of the vestry and with the concurrence of the entire vestry, appoints members to the search committee. **It is important to keep in mind that in accordance with the canons of our church only the Vestry can issue a call and then only with the approval of the Bishop. It is clear, therefore, that the Search Committee serves in an advisory capacity, albeit a crucial one.**

## COMPOSITION OF THE SEARCH COMMITTEE

The search committee should be as broadly representative of the parish as possible in a manner carefully selected by the vestry. Factors to consider in a good balance of representation are: age, sex, race, activities, and length of time in congregation. It should be made clear to the congregation that, though volunteers for the committee are given careful consideration, because balance is so crucial they may or may not be appointed to the committee. It is not appropriate for staff or other clergy to serve on the search committee. It is not appropriate for more than one member of the same household or family to serve. Wardens do not usually serve on the search committee, since they are to supervise its work and carry out other parish responsibilities. The chair of the search committee may be designated by the vestry or may be elected by the committee itself in an early meeting. As a rule of thumb, the size of a search committee is roughly equal to the size of the vestry (nine to thirteen members). **At least one vestry member (often two, and preferably those whose terms will continue into the next rectorship) should be appointed to serve on the search committee to serve as a liaison and information link.**

## DESIRED CHARACTERISTICS OF MEMBERS

In the Body of Christ no one member possesses all gifts, but rather we need one another. Likewise no one Search Committee member will have all the desired characteristics but together in Christ we are whole. Here are some desirable characteristics:

- Good organizational skills (essential for the chair!)
- Able to get promised work done on time
- Team player
- Person of prayer
- Member in good standing (attending church, giver of record, etc.)
- Willing to work for the good of the church
- Able to keep confidences (even from a spouse!)
- No hidden agendas

## SUGGESTED APPOINTMENT METHOD

Publicize the search committee membership criteria in the weekly bulletin and parish newsletter, inviting parishioners to suggest names to the wardens. The vestry reviews all suggested names and the complete parish membership list in view of the published criteria. **The vestry comes to a**

**consensus on the membership of the search committee.** The senior warden announces the search committee membership (and the chair, if the vestry has designated the chair) in the bulletin and parish newsletter.

## CLARITY ABOUT EXPECTATIONS

Before the work of the committee begins, there should be clarity about the vestry's expectations for this work and the form of the final nominations. (For example: How many names does the Vestry expect to have for their final consideration? Are there special geographic or salary limitations to be placed on the search? Will the vestry or the search committee, or both, conduct the final interview during the candidate/s visit to the church?) A search process budget, if not already formulated, should be developed and approved by the vestry to include such expenses as parish survey/questionnaire design, printing, videos, DVDs, brochures, travel expenses of Search Committee members and prospective Rectors and spouses as well as relocation expenses, and the cost of background checks on the final candidate/s. Care should be exercised to ensure clear lines of fiduciary responsibility between vestry and search committee. A joint meeting with Canon Howard, the vestry and the search committee is scheduled early in the search process.

## A **SAMPLE** VESTRY CHARGE TO THE SEARCH COMMITTEE

1. *Use the guidance and training of the Diocesan Transition Officer throughout the calling process.*
2. *Maintain open communication throughout the process with the vestry, congregation, diocesan transition officer and candidates.*
3. *Keep track of search process expenses, and inform the vestry if it appears that the Search expenses will exceed the search budget approved by the vestry.*
4. *Oversee the small group gatherings/holy conversation process that will provide much of the qualitative information to the parish for their profile.*
5. *Develop a parish profile/brochure to describe our parish, our goals, the responsibilities of the next Rector, the particular experience and skills desired in the next Rector, and current budget and financial status.*
6. *Develop an Office of Transition Ministry Community Portfolio for listing on the Office of Transition Ministry website ([www.otmportfolio.org](http://www.otmportfolio.org)). The vestry **must** approve this before Canon Howard will post it to the OTM web site.*
7. *After vestry approval of the parish profile/brochure and Office of Transition Ministry Portfolio, engage in a discernment process with the proposed candidates for Rector.*
8. *Recommend three final candidates to the vestry for election as rector.*
9. *Involve the vestry in the on-site visits of the final candidates, with the vestry conducting the formal interview of the finalists.*
10. *Help plan the Celebration of a New Ministry, and assist the vestry and the rector during the first six months to introduce the rector to the parish and community.*

When a search committee has been appointed, it is important for it to meet with the vestry to review the vestry's charge, the number of the final nominations desired by the vestry, the form of the final interviews, and the search process budget.

## Budget for a Search Process

Budgets always have a certain amount of guesswork, but search process costs are predictable within limits, given certain assumptions. Below are items that may need to be included in a transition & search process budget.

- Parish Survey cost
- Parish Profile/Brochure cost
- Mailing, printing, copying costs
- Electronic interviewing cost
- Visiting candidates in their setting:
  - *Per candidate visit:*
    - Travel, hotel, meals for 2-3 search committee members
    - A lunch/dinner with candidate and spouse
  - Background checks on final candidates—that is, any who will be brought for in-person interviews (ca. \$250 per clergy person)
- On site-interviews of candidates:
  - *Per candidate visit:*
    - Travel, hotel, meals for candidates and spouses
  - New Rector visit to clarify terms of call and arrange for housing
    - Travel, hotel, meals
    - Moving expenses for new rector

## Partial Sample Timeline

*This timeline picks up after the profile has been completed, and names have been received for the agreed upon periods of time, and there are a reasonable number of candidates.*

### Tentative Timetable

January 10	Search Committee Meeting—Check in Questions
January 31	Search Committee Meeting—Devising
February 5	Presentation of Names from Bishop Bauerschmidt and Canon Howard
February 9	Vestry Retreat (may bring in a special presenter to discuss transition and welcoming interviewees, as well as the eventual rector.
2/6 - 2/12	First Discernment, search committee members study OTM portfolios and resumes.
February 12	Search Committee Meeting—First Discernment using nominal voting technique.

February 13	Letters to “no’s” if any Letters requesting further information and references sent at the same time.
February 21	Search committee meeting
February 28	Search committee meeting
March 7	Search committee meeting
March 15	Deadline for candidates to respond and provide further information, etc.
March 21	Search committee meeting—begin second discernment. Two committee members assigned to separately review each candidate, divide and call references, consult and prepare to present their candidate to the committee.
April 2	Search committee meeting—second discernment. Committee members present candidates. Committee discerns further interest via telephone interviews and site visits.
April 5	Letters to “no’s” if any. Begin scheduling electronic interviews (Zoom, Skype etc).
April 8-12	Electronic interviews
April 22-26	Electronic interviews
April 29-May 3	Electronic interviews
May 5	Site visits—prepare written review for committee
May 12	Site visits—prepare written review for committee
May 19	Site visits—prepare written review for committee
May 20-May 31	Search committee meetings—final discernment of short list for vestry. Prepare written reviews of each candidate for vestry. Present names to Canon Howard for final background checks to be completed.
Early June	Assist vestry in welcoming candidates to [city/town]
Early July	vestry issues the call

## VIDEO INTERVIEW GUIDES FOR SEARCH COMMITTEES/VESTRIES

It is becoming more common among both secular corporations and non-profits, and among religious organizations to conduct video interviews prior to conducting in-person interviews. This allows for a better use of resources and offers advantages over telephone interviews. A video interview gives both the interviewers and the interviewee the opportunity to see non-verbal cues as well as to hear verbal responses.

Below are some simply guidelines to help Search Committees and Vestries conduct video interviews:

- Interviews should be conducted by a subcommittee of the search committee or vestry consisting of three persons plus a scribe.
- Two out of the three will ask questions, the third will take notes of the interview and the responses, as well as subsequent debriefing after the video interview as ended.
- Initial questions should be formulated ahead of time, and the sorts of questions that should be excluded should be discussed.
- The video interview should be recorded if at all possible, and notice of the this fact should be among the preliminary information given to candidates, with an opportunity to say no. For example “Thank you for making the time to meet with us today/tonight. With your permission, we’d like to record our interview so that the whole search committee/vestry can see your responses. Are you comfortable with that?”
- In some cases the Bishop may like to watch the video as well—If this is the case it will be made clear to the candidate ahead of time by the Canon to the Ordinary.
- You should then let the candidate know when recording has commenced, and when it has ended.
- Make sure to have the candidate’s application materials at hand for reference in follow up questions.
- Make sure you have your congregation’s profile and other materials in front of you in case the candidate makes a specific reference to it. Review it ahead of time so that it will be fresh in your mind.
- Questions and potential follow-up questions should be assigned ahead of time.
- Factor in time at the end to see if the candidate has any questions they would like to ask of the interviewers regarding the congregation.

*Appendix C: Nomination Form for Potential Candidate for Rector*

\_\_\_\_\_ Church

I understand that I must keep this nomination confidential to protect the privacy of the potential candidate.

Signed: \_\_\_\_\_

Potential Candidate Information

Name: \_\_\_\_\_

Current Parish/Position: \_\_\_\_\_

Current personal mailing address:  
\_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Best time to call? \_\_\_\_\_

E-mail: \_\_\_\_\_

(Attach an additional sheet if necessary to answer the following questions.)

How long have you known this person?

In what capacity have you known this person?

Why do you believe this person should be considered as a potential candidate?

Have you contacted or talked with the person you are recommending?\_\_\_\_\_

Please return this form to\_\_\_[Search Committee Chair's Name]\_\_\_\_\_.

Thank you for submitting this recommendation.

*Appendix D: SAMPLE LETTERS*

DATE

NAME AND ADDRESS

Dear \_\_\_\_\_,

The Search Committee at \_\_\_\_\_ Church in \_\_\_\_\_ has completed the [first/second/third] phase of its discernment process for Rector. We have identified \_\_\_\_\_ clergy with whom we will continue in conversation.

Although you are not one of the \_\_\_\_\_, you added to the richness and difficulty of our discernment task. We thank God for the gifts you bring to the church's ordained ministry, and we are grateful to you for making those gifts known to us, and for the time that you have spent in discernment with us.

The whole Search Committee joins me in thanks, best wishes, and prayers for God's continuing strength and presence in your life and ministry.

Faithfully yours,

\_\_\_\_\_, Chair

\_\_\_\_\_ Church Search Committee

**SAMPLE COVER LETTER TO POSSIBLE CANDIDATES #1**

DATE

NAME AND ADDRESS

Dear \_\_\_\_\_,

We have received your name as a possible candidate for Rector of \_\_\_\_\_ Church, \_\_\_\_\_ Tennessee. We have been given a copy of your OTM Portfolio and resume, and are eager to learn more about you.

We hope that you would like to know more about us also. We are enclosing/attaching our OTM Community Portfolio and Parish Profile. Included in this packet/e-mail are some materials that describe our community.

If you are interested in pursuing discernment with us for the position of \_\_\_\_\_, please send us a letter indicating why you are interested in our parish, a list of \_\_\_\_\_ clergy references and \_\_\_\_\_ lay references, and your responses to the enclosed questions, using the space provided, by \_\_\_\_\_[date]\_\_\_\_\_.

Do not hesitate to call me, or the Reverend Canon Jody Howard, if you have any questions. You may reach me by phone in the [morning, afternoon, evening] at \_\_\_\_\_, or by e-mail at \_\_\_\_\_. You may reach Canon Howard during the day at: 615-251-3322, or by e-mail at [jhoward@edtn.org](mailto:jhoward@edtn.org).

Thank you for considering the position of Rector of \_\_\_\_\_, and we look forward to hearing from you.

With all best wishes to you in your ministry,

Faithfully,

\_\_\_\_\_, Chair

Search Committee

Enclosures: \_\_\_\_\_ Church Materials

\_\_\_\_\_ Chamber of Commerce Materials

Questions



**SAMPLE COVER LETTER TO POSSIBLE CANDIDATES #2**

DATE

NAME AND ADDRESS

Dear \_\_\_\_\_,

We have received your name as a possible candidate for Rector of \_\_\_\_\_ Church, \_\_\_\_\_ Tennessee. We have been given a copy of your OTM Portfolio and resume, and are eager to learn more about you.

We hope that you would like to know more about us also. We are enclosing/attaching our OTM Community Portfolio and Parish Profile. Included in this packet are some materials that describe our community.

If you are interested in pursuing discernment with us for the position of \_\_\_\_\_, please send us by \_\_\_\_ [date] \_\_\_\_\_ a letter indicating why you are interested in our parish, a list of \_\_\_\_\_ clergy references and \_\_\_\_\_ lay references, and your responses to each of the following questions in 25 words or less:

1. What does your present position involve?
2. What do you like most about your present position?
3. What do you like least about your present position?

Do not hesitate to call me, or the Reverend Canon Jody Howard, if you have any questions. You may reach me by phone in the [morning, afternoon, evening] at \_\_\_\_\_, or by e-mail at \_\_\_\_\_. You may reach Canon Howard during the day at: 615-251-3322, or by e-mail at JHoward@edtn.org.

Thank you for considering the position of Rector of \_\_\_\_\_, and we look forward to hearing from you.

With all best wishes to you in your ministry,

Faithfully,

\_\_\_\_\_, Chair

Search Committee

Enclosures: \_\_\_\_\_ Church Materials

\_\_\_\_\_ Chamber of Commerce Materials

## ***Appendix E: SAMPLE ON-SITE INTERVIEW SCHEDULE***

*This is one way to cover different bases when bringing a final candidate to the parish for a visit.*

*Circumstances will require alterations in the schedule for each candidate's visit.*

### **THURSDAY**

- Ca. Noon: Candidate and spouse arrive
- Lunch with greeters & “tour guides” (from Search Comm. &/or vestry)
- 2:00-4:00 pm: Visit with Bishop  
*Includes time allowance for travel*
- 6:30 pm: Dinner

### **FRIDAY**

- 9:00 am: Tour church and town with “tour guides”
- Noon: Lunch with morning “tour guides” &/or afternoon “tour guides”
- 2:30-5:00 pm: Look at schools, neighborhoods, possible employers of spouse, or other items of interest to candidate and spouse; or possible meeting with church staff.
- 6:30 pm: Dinner with Search Committee and Vestry  
*Informal visiting, and may include some structured “getting to know us” presentations*

*After dinner, vestry may meet with candidate and respond to candidate's questions*

### **SATURDAY**

- 9:00 am: Eucharist with Homily  
*Search Committee members and Vestry only*
- 10:00 am: Formal Interview
- Noon: Lunch with Senior Warden and Search Committee Chair
- 1:00-3:00 pm: Candidate and spouse depart
- Vestry/Search Committee debrief to discern whether they can see candidate as rector of the parish and could support him/her as rector*