Revised: 6/12/26

Congregational Transition Procedures

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)

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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 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 clergy and congregations. 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 their 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 with the Vestry.

The congregation will want to plan a communal celebration so that the 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 prefer to make a gift from the church rather than encourage many gifts from individual members. A purse is often given. See *Appendix A* for important information about gifts to clergy.

The priest and congregation 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.

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, which elements of the traditional search process outlined below may be helpful in their circumstances. 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 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 of whom are 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 rector's departure, Canon Howard will meet with the Vestry to review the congregation's needs for clergy leadership during the transition and the available options. He will also provide guidelines for forming a search committee (see *Appendix B*).

B. A summary of vestry actions during the search process

1. Vestry seeks the appointment of an interim priest
2. Vestry seeks input on who should be on the search committee and discerns.
3. Vestry develops its charge to a search committee
4. Vestry appoints the search committee
5. Vestry gives a clear charge to the search committee
6. Vestry sets budget for search process
7. Vestry approves compensation package for new rector
8. Vestry approves the parish profile
9. Vestry approves Vocation Hub Community Portfolio
10. Vestry acts on the recommendation of the Search Committee and votes to elect (call) a new rector after interviewing one or more final candidates.
11. The Vestry then informs the Bishop (via the Canon to the Ordinary) and receives his permission to issue the call.
12. The Vestry then issues the call.
13. If accepted, work begins with Canon Howard on the Letter of Agreement.

PROJECTED TIMELINE

It may be helpful to view sample timelines at the beginning, in order to level set expectations. Some sample timelines from actual searches may be found in a handout provided by Canon Howard. Generally, the whole transition process can take anywhere from 18 to 24 months. It can happen more quickly, but the longer timeframe is a healthier expectation.

General timeframes:

1. Formation of a search committee: 1-3 months

2. Development of a profile: 2-7 months
   The development of a profile (as opposed to a simple information sheet that may be used in some cases) can take significant time.

3. Nominations & Seeking Candidates: 2 -6* months

4. Interviewing Candidates: 1 – 5 months

THE INTERIM PERIOD

Background

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.

On average, a search will take eighteen to twenty-four months from the time that the vestry meets with the Canon and begins the task of selecting a search committee. If there is a search for an interim or a lengthy pause at any point in the process, the time could increase.

The primary thing to keep in mind as leaders at this time is that your search is your own, and–except for key moments, and issues out of anyone's control (such as the number of interested clergy)--your search timeline is dependent on the process moving forward–a process driven by the energy of the Vestry and (eventually) the Search Committee. Canon Howard will provide resources and answer questions, and guide you from step to step ***when you are ready to take them***, but the impetus to begin and continue this work, to move through the interim period, must begin with the lay leadership of the congregation.

The Work of the Interim Period

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 assists 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, including self-studies, surveys, small groups, etc.

The **search phase** is usually the longest of these stages. During this time, the congregation receives nominations, nominees undergo initial vetting, the search committee begins its work, and finally offers its finalists to the vestry.

The Call is the final stage of the search process and can be understood as the vestry's final discernment and their extension of an invitation.

The tasks that need to be addressed during a transition can be grouped by the themes articulated in the Interim Letter of Agreement. These categories are included in Interim Letters of Agreement precisely because they constitute the overarching work a parish needs to undertake before calling a permanent Rector.

These themes or focal points include:

- **Heritage**: Reviewing how the congregation has been shaped and formed.
- **Mission**: Defining and redefining a sense of purpose and direction.
- **Leadership**: Reviewing the congregation's ways of organizing and developing new and effective lay leadership.

- **Connections**: Discovering all the relationships and networks a faith community builds beyond itself. Paying particular attention to renewing and (where necessary) reworking relationships with the diocese, so that each may be a more effective resource and support to the other.

Future: Discerning and developing congregational and pastoral profiles.

The core of these focus points can be summed up as "Who are we?" (Heritage, current mission, current leadership, connections), "What is God calling us to do?" (Future mission, future leadership), and "Who are our neighbors?" (Which also relates to who is calling us to).

During the process of self-reflection and articulation, the above order makes sense. During the process of self-presentation and sharing with candidates, through the parish profile and interview processes, the order may be helpfully altered.

After the completion of the self-study, the search committee will 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, ensuring it is posted on the website, etc.

Canon Howard has resources to share and is available to meet with you to discuss the challenges and opportunities of the transition time in more detail.

FORMATION OF A SEARCH COMMITTEE.

The formation of the search committee should ideally be completed 1-3 months after the initial meeting between Canon Howard and the vestry to review the handbook and the nature of the Search Committee.

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 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 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, present 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, representing both the parish and the wider community to potential rectors.

    - To ensure a diversity of voices and a broad representation of the congregation.

2. If the vestry feels 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 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).

a. preparing for & overseeing the self-study and congregational surveys.

    i. A survey should not be limited to questions about what sort of clergy person the congregation desires for their next rector. Instead, questions should focus on what mission is ongoing in the parish and what kinds of mission and engagement parishioners desire to pursue 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 is currently only one recommended professional survey, the Congregational Assessment Tool (CAT) by Holy Cow Consulting. The Canon to the Ordinary can also craft a survey based on the desires and insights of the vestry and search committee.

    iv. Small group conversations. Sometimes called Holy Conversations, these are done using something known as the Focused Conversation Method, or the O.R.I.D method. More information is available in Appendix F.

b. Updating the website, if needed.

Transition Process Design

As early as possible after a Search Committee has been appointed, a meeting of the Vestry **and** The 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 Search Committee. Items of interest might be: Will there be a website redesign? How many bids should they seek?

Clarifying the expectations for the search is essential. 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, 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 preparing the Vocation Hub Community Portfolio for posting online
- Hospitality (For visiting candidates)

The Search Committee should develop a tentative timeline (there's a sample in the 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 that 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. **<u>Any</u> 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. 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 are a formidable enterprise that can stretch on for months, 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***. The goal is to take as much time as necessary to do a thorough job while not wasting time.

While the process can seem complicated, there are four major tasks:

- **Developing a PROFILE**
  - ✤ Performing self study (Search Committee)
  - ✤ Updating Web site (Search Committee and/or Vestry)
  - ✤ Determining compensation (Vestry/Finance Committee)
  - ✤ Developing & Posting Profile (Search Committee or Vestry—always with vestry approval)
  - ✤ Filling out Vocation Hub Profile (Search Committee or Vestry, with vestry approval)
- **Securing NOMINATIONS**
  - ✤ This means disseminating the profile (Search Committee)
  - ✤ Posting the Vocation Hub Profile (Search Committee →Canon to the Ordinary)
- **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 (Search Committee)

The first task of the Search Committee is to provide a comprehensive self-study by the congregation. In most instances the search committee 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. Recommended tools include the Congregational Assessment tool (CAT) from Holy Cow Consulting, or the US Congregational Life Survey. Vestries or Search committees are encouraged to visit the US Congregational life Survey site (https://uscongregations.pcusa.org/) and the CAT website, 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. 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 (done using the Focused Conversation Method), 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 (and perhaps with newcomers and congregants).

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.

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 (Vocation Hub) Community Portfolio

For the Rector position to be posted on the computer database at the Office of Transition Ministry (Vocation Hub) in New York, the Search Committee will need to develop a Vocation Hub Community Portfolio, the form of which Canon Howard will share with the Search Committee. The Community Portfolio is completed and posted on Vocation Hub 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 Vocation Hub Portfolio information. The Vocation Hub 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 Vocation Hub Portfolio will also need Vestry approval before Canon Howard can post it on the Vocation Hub website.

Once the Parish Profile is posted on the parish's website, and the Vocation Hub Community Portfolio is posted, 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 (Vocation Hub)

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 Vocation Hub 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 Voction Hub website. Episcopal News Service, the diocesan website (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 (Vocation Hub)

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

B. The Official List of Candidates

Nominations from all of these sources are given an initial reference or "red flag" 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 them on the official list. If a potential candidate is not interested in entering 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 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. Vocation Hub Portfolios and resumes will be used during this phase. Canon Howard will explain how to read the Vocation Hub 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 Vocation Hub 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 Vocation Hub 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
    a. 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 Vocation Hub 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 Vocation Hub 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 here: http://bit.ly/parochial_report

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. The 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 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 the body 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. Sandra Beld, (sbeld@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 becomes much more active in the process. 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 Vocation Hub Portfolio, the resume, the letter of interest, responses to questions sent to the candidates, and the visitation reports, if visitations have been made to the candidate's parish. 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 calls. 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 Vestry or 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/or the 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 oversees distribution 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 Vocation Hub 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 <u>and</u> 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.[1]

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 6th and 12th 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 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: Search Committee Guidelines

THE SEARCH COMMITTEE

The search committee is a creation of the vestry and works for and on behalf of the vestry.

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.Vocation Hubportfolio.org). The vestry* ***must*** *approve this before Canon Howard will post it to the Vocation Hub 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.

First Steps may include

1. Determining which survey tool for a parish survey is best.
2. Interviewing and recommend web designers for a website update if needed.
3. Gathering information about facility needs that should be addressed during the transition period before calling a new priest, and communicating those to the Vestry.
4. Getting 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.
5. Overseeing the gathering of information that may be useful in the writing of a parish profile, such as:
    - 5.1. History of the Parish (including previous clergy lists)—see sample profiles for potential uses.
    - 5.2. Copy related to ministries of the parish.
    - 5.3. Description of parish demographics and finances.
    - 5.4. Description of local community, schools, chamber of commerce type information.
    - 5.5. Determine what aspects of this information should be included in a website refresh.

After the completion of the self study, the search committee, 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.

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 Vocation Hub 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 Interviews:

It is now common among secular corporations and non-profits, as well as 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 simple guidelines to help Search Committees and Vestries conduct video interviews:

- The purpose of the electronic interview is to get an impression of each candidate, not to answer every question you may have about them.
- Interviews may be by the search committee or vestry, or by a subcommittee of the search committee or vestry. I suggest a subcommittee consisting of no more than five persons one of whom should be a scribe.
- The scribe will take notes of the interview and the responses, as well as subsequent debriefing after the video interview has ended. While the scribe won't ask initial questions, they may ask follow up questions and questions for clarification.
- Initial questions should be formulated ahead of time, and the sorts of questions that should be excluded should be discussed.
- Questions and potential follow-up questions should be assigned ahead of time.
- One way to come up with good electronic interview questions is to look at the sample questions on page 33 of the Transitions Handbook and adapt them for the electronic interview rather than a written response.
- Make sure to have the candidate's application materials at hand for reference in follow up questions.
- Make sure you are familiar with your congregation's profile and other materials, and have them 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.
- Factor in time at the end for any questions the candidate may have.

Before the Interview:

- The chair or other designated member of the search committee should reach out to the candidate to let them know you would like to invite them to interview via Zoom or a similar platform. This communication may be by email (you may choose to send an email communication with a PDF letter on church letterhead attached).
- List two to three potential dates/times from which the candidate may choose. Weekday evenings or Saturdays are suggested—no Sundays.

- The Search Committee should designate the members who will be responsible for each interview.
- Those members should determine which subject area or theme they are most passionate about, and plan to ask an initial question related to that area. Remember, only the three interviewers will ask initial questions, but they, as well as the scribe, may ask follow-up or clarifying questions.
- Each member of the Interview Committee should be prepared with two initial questions. They can decide whether or not to use their question or to ask a different follow-up if the candidate has addressed the question while responding to something else.
- Establish the agenda for the meeting and share it with all participants. An annotated agenda may be shared ahead of time with search committee members. For example, their agenda may include the text of the prepared questions and note who is prepared to ask them.
- Take the time to familiarize the interview committee with the software. Even if you've been using the software (Zoon, Google Meet etc.) for some time, it is helpful to go over everything ahead of time to make sure things are working smoothly.
- Test your equipment ahead of time (maybe have a test meeting with the interview committee prior to meeting with the candidate).
- Choose a good location or locations from which to conduct the interview. Is it quiet? Are you likely to be interrupted?
- Prepare the candidate:
    - Interviews can be challenging to candidates and those interviewing. Attention should be paid to putting participants at ease, including the candidate. Not all clergy have participated in video interviews before in spite of them becoming more common. Smooth the way by preparing yourself and your candidate.
    - Once a video interview is confirmed, follow up with an email detailing what the process will look like:
        - What software application was agreed upon to be used for the video interview?
        - Encourage them to test it out before the video interview occurs.
        - Let the candidate know who they will see as part of the video interview. This should be followed up by introductions at the

beginning of the actual video interview.

- Give them an estimated end time.

The Interview Structure:

Start time Gathering & Welcome

The chair of the search committee or a designated member of the interview committee should welcome everyone to the meeting and thank them for their time. (Special thanks should be given to the candidate).

+2 Introductions

Everyone should introduce themselves and mention one thing about them—a role in which they serve at the church besides being on the search committee, something about their life, work, or ministry etc.

+3 Minutes Go over the basic details of the meeting platform.

It is always beneficial to go over things like the mute/unmute function, expectations for when folks will be unmuted (it is always best for folks to remain muted to avoid the distraction of background noise, especially in meetings with more than two or three people, and to unmute themselves when they're ready to speak), the camera on/off function, the raise hand feature, etc.

+2 minutes Opening Prayer

It is good for the chair or other designated member of the search committee to open with prayer. This demonstrates that you're a church where people pray, and it allows the candidate to engage in the interview. The candidate should be asked at the time of the opening prayer if they would be willing to close the meeting with prayer, something like "It seems like a good time for us to begin with prayer. I will open us with prayer, but I wonder Fr/Mtr __, if you would be prepared to close us with prayer at the end of the interview?"

+ 2 minutes First question

Framing Search Committee Questions Discussion Starters

Category	If you are looking for:	You might ask…
Personal	Someone who is inspired to work with people and to participate in God's work in the world.	Do you remember how you received your call to ministry?
	Someone who is inspired to work with people and to participate in God's work in the world.	What key theological ideas shape and influence your ministry?
	Someone who is attuned to their own self.	How has your mind changed in the last ten years?
	Someone who has curiosity and is focused on growth.	What books have influenced your thinking lately?
	Someone who has the ability to be candid about own challenges or failings.	Tell about a troubling time. What happened? Were you morally tested? What was your self- discovery?
	Someone who is either a leader (prophet, proactive, visionary) or a pastor (chaplain, priest, pastoral)	If you were to select two words that best describe your understanding of ministry, which of the following words would you choose (chaplain, prophet, priest, proactive, pastoral, or visionary)
	Someone who can receive feedback and appreciate it	Who is your "Nathan"? Colleague? Therapist? Mentor? Family Member?
Leadership	Someone who can face rather than avoid conflict	How have you managed conflict? What have you learned? Any examples?
	Someone who can set a definite direction, bring out best in others	Describe a situation that demonstrates your leadership.
	Someone who can recognize success and see it as a learning opportunity	What would you consider a success in your ministry? What did you learn?
	Someone who does not try to please everyone, who can disturb the peace.	What is the biggest risk you have taken?

	Someone who has been intentional in learning from others	In what way have you been involved in mentoring (receiving)?
Category	**If you are looking for:**	**You might ask…**
Parish	Someone who is self-aware; someone who sees a "fit" with their skills and interests and the needs of the community	What attracted you to your parish?
	Someone who has positive views of lay leaders	What is the role of lay leadership in your current parish and how are you developing that role?
	Someone who is able to take initiative, to decide, etc.	What did you attempt to accomplish in the first six months in your current parish?
	Someone who can "confront" in responsible manner.	Give an example of how you dealt with unrealistic expectations of clergy and staff.
Staff	Someone who is aware of own strengths and weaknesses and one's expectations of others	What kind of staff members are needed to compliment your leadership style?
	Someone who can handle difficult and emotional assignments	How do you handle staff development issues? Have you ever terminated someone? How was this done?

Sample Interview Questions: Video Interview

If you have any questions, please email Canon Howard at JHoward@edtn.org.

Date & Time of the Interview:

Location:

The members of the Search Committee who will be conducting the interview:

The video interview is a preliminary interview and is really intended to provide a helpful overview of the candidate. Time should not be spent on questions for which you already have answers from application materials or the Vocation Hub portfolio, etc. Instead, questions should be targeted to help you
determine the following:

- Would you recommend inviting this person to an in-person interview with the full vestry?
    - Much of this hinges on the criteria of whether the person is, on the whole, a "believable" candidate to serve your congregation. Does a good match seem possible or probable?

There are several key areas that a Search Committee will be seeking insight into when interviewing a candidate.

Key Areas

Theology — Commitment to Christ, sense of loving God, understanding of the Church in the 21st Century, and capacity to preach and minister on sensitive topics.

Emotional intelligence — Self-awareness, able to manage emotions and recognizes others, sensitivity and perception, maturity, ability to self- differentiate

Leadership ability and style — Rector as leader vs. rector as chaplain, decision-making, conflict resolution, staff and volunteer management

Initiative, energy — physical and emotional

Communication/interpersonal style and skills — from one-on-one to small- and large-group settings, to congregation, interpersonal communication comfort and facility

Creative thinking — capacity for vision and change as we imagine our parish future and the future of the Episcopal Church

Social wherewithal — facility with social settings, able to engage, converse, mingle, "be a part of"

Entrepreneurial spirit — initiating and leading new ventures (in parish, community, prior career settings)

Things to keep in mind

Before the interview, each committee member should think of questions that they would like to ask. Rather than asking about hypothetical situations, ask the candidate how they have dealt with issues in their ministry in the past.

Past behaviors are the best indicator of future behaviors. Develop a single list of questions so that each candidate is asked about the same topics. Depending on each candidate's profile and answers to their questionnaire, you might have several additional personal questions for each candidate.

Decide who will start the video chat, make introductions, and ask the first questions.

Watch your time closely. One person should be in charge of the conversation. Let each committee member ask at least two questions.

A list of potential questions is included below, followed by some possible questions from the candidate that the committee should be prepared to answer. Develop more questions based on the candidate's application materials, your church structure and identity, and your strengths and weaknesses.

Sample questions

- What are you passionate about in your ministry? In life in general?
- Can you share a moment that was particularly meaningful to you in a spiritual context? What do you think it indicates about your faith or spirituality?
- How did you first experience your call to ministry? Do you reflect on the call differently today?
- Can you reflect on a moment where you experienced personal growth in your ministry? What prompted the growth?
- Think of a moment when you challenged members of your congregation to go deeper in their faith—what was their response?
- What do you find meaningful in worship?
- Describe how you lead worship. Can you share an example of leading a service that was particularly fulfilling to you or your parishioners?
- What has your experience been with vestries and other lay leaders? Can you think of a moment where an effort you've undertaken along with lay leadership has gone very well, or less well than you had hoped?
- Describe an experience in the church that you have found frustrating. How did you work through it or lead through it?
- Have you had any disagreements in the course of your ministry? Please describe how you've worked through one.
- If we were to ask a friend or parishioner with whom you have a good relationship, what would they say your greatest strengths are? Growing edges?
- What would someone with whom you haven't had a good relationship, or a parishioner with whom you are not close, say your greatest strengths are? Growing edges?
- Describe a leadership training you have led. What was successful, and what might you change if given the chance?
- When facing a problem, what questions do you naturally ask? - How would you describe your leadership style?

- Can you give the outlines of an emotionally demanding pastoral encounter—whether counseling or a visitation—how did you approach the encounter? Where did you experience God in the midst of it?
- Describe your own process of discernment. How are you going to approach your decision- making when it comes to accepting a new call?

In preparing for the interview, remember that you will be asked questions also. Below are several possible questions candidates may ask.

- Why are you interested in me as a candidate?
- What role do you expect my family to play in your church?
- What concerns need to be addressed in the congregation and the community?
- What significant events and people have shaped your church?
- What is your vision for your congregation?

It is important to know what you cannot ask. **The general rule of thumb is not to ask questions that you would not want to answer yourself.**

Questions to avoid include questions about age (which you'll know, at least generally, from resume and Vocation Hub information), physical characteristics (you'll be able to see the candidate on video), disabilities or chronic illnesses, and national origin. You may already have this information in the candidate's profile, but only if they've voluntarily added it. The candidate may mention it in an interview, at which point natural follow ups are allowed—again, under the rubric of "would I want to answer this myself.

Allow time for the candidate to ask any final questions. Before ending the interview, let them know what happens next and when you will make contact.

One committee member should be designated to take notes during and after the interview (though others may also take notes for themselves) recording enough information about the call to be able to reflect on the interview later. Each member should note significant impressions.

Following the interview, the committee should take a few minutes while the conversation is fresh in their minds to discuss their impressions. These thoughts should be summarized and kept for later reflection.

Appendix C: Vocation Hub Templates

You may download a fillable PDF of the Vocation Hub Community Profile Template here:

https://duke.is/vocationhub

Once you have filled in the profile, please return it to Canon Howard so that he can post the information on the Vocation Hub database.

Appendix D: 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:_____

<u>Potential Candidate Information</u>

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 E: 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 Vocation Hub 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 Vocation Hub 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.

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 of the Search Committee

Enclosures:
_____Church Materials
_____Chamber of Commerce Materials

RESPONSES TO QUESTIONS

By the Rev._____

NOTE: These questions need to be designed around the top three for four skills or characteristics desired in the new rector, or the top three or four responsibilities of the new rector. The page is designed to encourage brief, to-the-point responses. Experience indicates this style of question-and-response differentiates candidates from one another quickly and reliably.

1. Tell us how you delegate program responsibilities and monitor results.

2. Describe an event or program you conceived and carried out that nurtured spiritual growth in a parish.

3. Give an example of your experience with identifying and recruiting participants, and acting with them in an outreach program.

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 Vocation Hub 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 Vocation Hub 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:
___ info about the church
___ info from the chamber of commerce

Appendix F: 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

Appendix G: The Focus Conversation Method

- Video Introduction to the Focused Conversation Method and constructing small group conversations: https://vimeo.com/699544753
    - The Power Point in the above video can be downloaded and reviewed here: https://bit.ly/focused_convo_ppt
    - The above Power Point in PDF format: https://bit.ly/focused_convo_pdf