

From Rector to Rector

The transition process lays the foundation upon which a congregation builds healthy mission and ministry.

The Role of the Vestry

- ❖ **Provide for a healthy environment that facilitates the best possible transition between clergy leadership**
- ❖ **To be a resource to the congregation, leading through change**
- ❖ **Lead with vision, mission, and values**

The Role of the Bishop

❖ **The Bishop's role is to communicate to the vestry regarding names for consideration (III.9.3).**

- **The names of proposed nominees must be sent to the "ecclesiastical authority"**
- **The ecclesiastical authority must be satisfied that that the person is duly qualified, duly elected, and that upon election has accepted. (III.9.3.3)**

The Role of the Canon to the Ordinary

❖ **The Canon To The Ordinary's role is to be a resource to the congregation's leadership throughout the search process.**

Stages of Transition

- ❖ **There is a natural flow of change that begins with the current rector's leave-taking and comes to an end with the arrival of the next rector.**
- **Until a new coalition of leaders emerge around a vision, shared values and common goals, the congregation will experience tension.**

Stage One: Loss

- ❖ **The issue is grief**
- ❖ **The Emotional Content is charged with sadness, anger, and anxiety**
- ❖ **The task of the leader is to bring closure and celebrate the past**
- ❖ **The danger is failure to face loss (denial), "everything will continue the same."**
- ❖ **Icon: Celebration of ministry during rector's tenure.**

Stage Two: Preparation

- ❖ **The issue is re-assessment**
- ❖ **The Emotional Content is charged with resolve and anxiety**
- ❖ **The task of the leader is to take a realistic look at the present situation and needs**
- ❖ **The dangers are creating a profile of the church "we wish we were" or "that we believe we were ten years ago."**
- ❖ **Icon: Meeting with Canon, hiring an Interim, and pre-search work**

Stage Three: The Search

- ❖ **The issue is finding the person to lead for the future**
- ❖ **The Emotional Content is charged with anticipation and excitement**
- ❖ **The task is finding the best leader with the right skills to help us revitalize our sense of identity and mission**

- ❖ The danger is finding a person as different from the past Rector as possible; selected by highlighting skills not resident in the former rector
- ❖ Icon: Appointment of search committee
- Stage Four: Call/Start**
- ❖ The issue is having a “Good Start”
- ❖ The Emotional Content is charged with enthusiasm and euphoria
- ❖ The task of the leader is to create a warm and welcoming atmosphere, set the tone for the working relationship
- ❖ The danger is focusing on the new clergy as the solution to all the congregation’s problems
- ❖ Icon: Celebration of new ministry and transition team

Stage Five: Adjustment

- ❖ The issue is reality versus expectations
- ❖ The Emotional Content is charged with frustration and anger
- ❖ The task of the leader is to come to terms with the reality and extent of change
- ❖ The danger is focusing on the personality of the new Rector or isolated areas of symbolic change
- ❖ Icon: First year mutual ministry review and celebration

Stage Six: Re-visioning

- ❖ The issue is finding a shared identity, articulating a common vision
- ❖ The Emotional Content is resolve followed by excitement.
- ❖ The task of the leader is to focus on shared vision, values, and goals
- ❖ The danger is putting emphasis on affiliation issues rather than vision
- ie: feeling good about one another versus setting about the work that needs to be done
- ❖ Icon: Mutual ministry review leading to adjustment of congregational goals and strategies

The Wellness Assessment

The Assessment Process

- ❖ Sometimes after particular circumstances a congregation may spend an extended period of time doing assessment work as a foundation for the pre-search process.
- ❖ Assessment may be done:
 - Following a long tenure
 - Dissolution of a pastoral relationship
 - Removal of clergy
 - Misconduct
 - Congregational dysfunction

The Process May Include

- ❖ Congregational assessment by trained consultant
- ❖ Leadership training
- ❖ Congregational healing process
- ❖ Conflict resolution
- ❖ Short term goal setting leading to pre-search

The Pre-Search Process

1. Appointment of a Parish Brochure Committee

- ❖ **Two or three people who are responsible for creating a brochure for prospective candidates**
- ❖ **The brochure will**
 - Provide information about the church
 - Outline its mission
 - Present a profile of the type of leader desired
- ❖ **The group will gather information and material about the church and community and incorporate material produced during the Congregational Visioning Event and the Congregational Survey.**
- ❖ **The Goal: is to have a complete brochure for the perspective candidates at the time the search committee is appointed so that the search can commence without delay.**

2. Definition of Core Values

- ❖ **Quality clergy will expect that the congregation has defined its core values within the last year or two.**
- ❖ **Vestry members, carefully selected ministry heads, leaders and new members (1 year or less) should be a part of this process. The whole group will meet together, then ten or fewer people will be selected to write the values statement.**
- ❖ **The results will be reviewed and approved by the vestry, then turned over to the Parish Brochure Committee. In addition, the core values statement needs to be reviewed at all subsequent meetings in this process.**

3. Creation/Affirmation of Mission Statement

- ❖ **Is there a mission statement?**
- ❖ **Does the statement reflect the current mission?**
- ❖ **If it does this step can be omitted. If not, a new mission statement needs to be created. The meeting should have no more than 20 persons present – the fewer participants the better. The vestry and a few others should participate.**
- ❖ **Any mission statement should be turned over to the Parish Brochure Committee and the group making arrangements for the Visioning Event. In addition the mission statement needs to be reviewed at all subsequent meetings in this process.**

4. Congregational Visioning Event

- ❖ **A weekend meeting should be held with a minimum number of participants equal to about 25% of the average Sunday attendance, including vestry members and other leaders.**
- ❖ **The objectives:**
 - To discern the vision for future ministry for the next 1-3 years; and
 - To identify the desired skills/qualities/leadership style of the person who should be called as rector to lead the congregation into fulfilling these goals.

Visioning continued...

- ❖ **If the congregation has recently established ministry goals, this meeting can be shortened to review those goals and discuss the leadership component.**
- ❖ **Results of the Visioning Event are turned over to the Parish Brochure Committee for the brochure.**

5. Parish Survey

- ❖ **Results from the previous meetings are utilized in the creation of a brief survey for the congregation.**
- ❖ **This survey will generate demographic information about the congregation and further discern the mind of the congregation concerning the new rector in relation to the ministry goals established at the Visioning Event.**
- ❖ **Opportunity should be given for members to nominate clergy, who fit the leadership profile, for the consideration of the search committee.**
- ❖ **It is recommended that this survey be distributed to each member of the congregation, as well as being available on at least two Sundays.**

Parish Finances

- ❖ **It is the responsibility of the vestry to:**
 - **Develop a compensation package.**
 - **Budget for the search (Brochure and Search Committee Expenses).**
 - **Budget for Interim and staff**

Search Committee Selection

- ❖ **It is the sole responsibility of the vestry to form the search committee. The members of this committee should be:**
 - **people of prayer**
 - **committed to the parish through working, worship, and giving**
 - **available for travel and weekly meetings**
 - **able to work as a member of a team.**
- ❖ **It is recommended that the group have seven to nine members, with twelve being a maximum, and include representation from the vestry. Alternates are generally not necessary.**
- ❖ **The Senior Warden serves *ex officio* on the search committee. The vestry may appoint a Chair for the committee or defer that decision to the group itself.**
- ❖ **The search committee will then meet with the Canon to the Ordinary to begin the process of finding a candidate to recommend to the vestry as the next rector.**

The Vestry's Work During The Presearch Process

- Lead through the change**
- Is responsible for the Pre-search process: Vision, Mission, Values, and Strategy**
- Prepare a budget**
- Select the search committee and communicating the number of names they need in order to call a rector (1, 2, or 3).**

The Search

Clergy in the Episcopal Church

- ❖ **There is no large-scale absolute shortage of priests.**
- ❖ **There is a structural mis-match between where clergy are available and where they are needed, mostly caused by mobility restrictions and income requirements created by family obligations. This has resulted in locally acute shortages.**
- ❖ **There will be an absolute shortage of priests in the future if ordinations maintain their current level and age pattern.**
- ❖ **The number of clergy expected to retire in each of the next ten years is driven by baby-boomers coming to the end of life-long service in the church and mid-life ordinands reaching retirement age after ten or fifteen years of service.**
- ❖ **The current average age at ordination is 47, which indicates an average working life span of fifteen to eighteen years, necessitates twice as many ordinands each year than if the average age were 30 to 35.**
- ❖ **Instead, the number of ordinands has dropped to an historically low level in the post WWII period.**
- ❖ **There is significant clustering in age ranges with very few “Gen X” clergy, there continue to be new additions to the “Baby Boomer” cohort due to mid-life ordinations.**
- ❖ **It is not clear whether late and mid-life ordinations will continue at their current rate.**
- ❖ **First career ordinations turned sharply lower with the arrival of “Gen X”, so might second career ordinations as this group reaches mid-life.**

Charting Ordinations

Charting the Age of Ordinations

Charting Retirements

Age Profile for Active Priests

Age Profile for the Diocese of Texas

Ethnicity in TEC

Names, Names, Names...

- ❖ **Once the search committee is formed it will be a natural process for them to begin and gather names. Names may come to the search committee in a variety of ways:**
 - a) candidates themselves, who submit their names directly to the parish;
 - b) candidates recommended by parishioners.
- ❖ **It is recommended that you utilize a standardized form to gather information about these persons.**
- ❖ **The Committee should communicate with your congregation the opportunity to recommend persons and the simple procedure to do it.**
- ❖ **Names can be continually gathered during the time frame of the search. It is not unusual to need additional names months after the search has started.**
- ❖ **All names that are recommended are sent to the Bishop of the Diocese of Texas care of the Canon to the Ordinary.**
- ❖ **An initial list of names should be sent in as soon as the Search Committee is organized. Additional names may be submitted as they are recommended.**

CDO Profiles

❖ **The Bishop's Office will return the list of recommended names to the search committee with the Church Deployment Office (CDO) profiles attached.**

Keeping the Congregation Informed

❖ **Throughout the search process, communication with the rest of the parish is essential, while maintaining the discretion and confidentiality necessary to a Search Committee's deliberations.**

❖ **Actual names of people being considered are kept confidential, but a parish should be kept abreast of the general progress of the search.**

❖ **Keeping the congregation informed through newsletters, announcements and story boards helps build trust in the search committee's work and progress.**

(Example: "The search committee has made 3 first visits in the past month and 1 return visit.")

❖ **It is good to have a search committee member serve as the communication coordinator for sharing information with the congregation.**

Sending the Parish Profile

❖ **Once the list is returned from the Bishop, the search committee sends each candidate a parish profile, and letter of introduction.**

• You will want to ask for their interest in this process. After two weeks contact the candidate and if they are interested set up a visit.

• Some parishes may ask for the candidate to write answers to questions.

• Candidates should not be taken off the list based solely on CDO profile or upon their written answers.

Search Committee Teams

❖ **It is very advantageous for a Search Committee to be divided into teams. A Search Committee that works in total without teams might only be appropriate in small pastoral or family size congregations, but teams are always recommended.**

❖ **Teamwork facilitates consensus building, spreads out the travel responsibilities, and better utilizes each member.**

❖ **Most Search Committees divide into 2-4 teams, depending on the size of the search committee and the congregation.**

❖ **Each team should be balanced according to the giftedness of the individuals. The team should have a captain (coordinator) who makes the arrangements for travel and the visit with the candidate and coordinates the work of that team.**

❖ **Each team also needs a recorder who will document conversations and recommendations made by the team immediately after the interview. In addition, the recorder will write the responses of the team after the visit to the Sunday services.**

The Visits

❖ **It is really important to get on site as soon as possible – GO VISIT!**

❖The team goes for a Saturday evening visit and pays for babysitting of the candidate's children if necessary. It is important to split the visit into formal and informal sessions. Make sure to include the spouse in the informal times which are often best achieved during a meal at a nice, quiet restaurant.

❖Don't interview the priest's children.

❖Plan to have the team spend the night in a hotel and attend Sunday services. Don't sit together at the service because you look very conspicuous when you do! Split the team and attend all the services offered that morning. Upon completion of the visit the team will take time to share thoughts and record responses for future reference.

Second Visit

❖If the committee believes that the candidate is worth a second visit a second team should be sent. The first team should review their observations with the second team in order to clarify any information and help shape the second interview and visit.

If the Candidate Visits

❖Sometimes it may be necessary for the candidate to come and visit. This is unusual, but it needs to be a stealth visit. It is extremely important that the candidate not attend Sunday worship or meet anyone other than search committee members if this type of visit is necessary.

Shortening the List

❖It is a natural process for the committee to delete candidates from the list. You probably will not have a problem getting to a few very qualified and strong candidates; especially if you underwent the search committee training.

❖Please notify them as you delete their names.

❖The only names you want to keep at the end are the top three – and you will notify the two not chosen after the call is accepted by the new rector.

❖Background Checks for non-EDOT clergy

The Final Stage of the Search

❖The final stage of selecting a nominee is one of close scrutiny, prayer, and reflection.

❖The resources of parishes have a considerable effect on the actual form such discernment takes, in the amount of travel and visitation of the candidate in his/her present parish or situation, in conducting personal interviews, and in gathering vital information on the candidate.

❖Once the Search Committee comes to consensus on whom it wishes to recommend as the next rector of the parish, the name is presented to the Vestry for consideration.

The Vestry's Work During The Search Process

Lead through the change

- Is responsible for insuring the search committee communicates well with congregation.**
- Is responsible for insuring funds are available for search committee**
- Insure stability and continued ministry of congregation: set goals, celebrate accomplishments.**
- Support the search committee with prayer. Support the search committee to congregation.**

The Call

Vestry Meeting

- ❖ **When the Search Committee is ready to recommend a candidate to the Vestry, there should be a called meeting for that purpose.**
- ❖ **Both groups should attend.**
- ❖ **It should be an executive session of the Vestry because it is taking up a confidential personnel matter.**

The Decision

- ❖ **The Search Committee should present the candidate's name to the Vestry, cover the reasons why they are nominating that candidate, provide any helpful information (resume, etc.), and answer questions the Vestry may have.**
- ❖ **This is the Vestry's decision point. If they move forward for a visit this is considered an affirmation moving towards a "final decision" on the Vestry's part.**

Informing the Candidate

- ❖ **Once the vestry determines to move forward with the #1 candidate, the Senior Warden should telephone the candidate, inform him/her that the Vestry would like to invite the candidate (and family) to visit the parish in preparation for a call.**

The Visit

- ❖ **At the first opportunity a letter should be written extending the invitation to visit. The Senior Warden and the Chair of the Search Committee can coordinate details of the visit.**
- ❖ **This visit is not a public event. It should take place during the week and should include a meeting with the Vestry.**
- **Other meetings should be at the request of the candidate. It is usual for the candidate to meet with staff members, including the Head of School if there is a school, and any of the key ministry leaders desired.**
- **There should be no public introductions or occasions.**
- ❖ **There should be a meeting of the candidate, the Senior Warden, and the Treasurer to negotiate the compensation package.**
- **All compensation, housing, and expense agreements should be complete before the call is accepted.**

❖ **Housing arrangements need to be explored, including time with a realtor if the priest wishes to get an idea of what is available in the community.**

• The candidate may request information about other items of interest (schools, employment opportunities for spouse, etc.) and may want to schedule time to learn about these.

The end of the Visit

❖ **There is usually a social event attended by Vestry, Search Committee, and spouses, but the "business meetings" do not include spouses.**

• Groups of two or three can share some meals during this time, but there should also be some breathing room in the schedule for the candidate and spouse to have time for private discussion and reflection.

❖ **Before departure, the Senior Warden and the candidate should agree on when the parish may expect to hear the candidate's decision.**

Acceptance of Call

❖ **Other candidates should not be informed until the call is formally accepted.**

❖ **Do not make an announcement to the congregation that a call has been issued because of the resulting disappointment if it is not accepted.**

❖ **The best course is to try to keep the visit low-key and wait until the announcement of an accepted call can be made, including the new rector's starting date.**

Documents of Call

❖ **Official Letter of Call**

❖ **Letter of Agreement**

❖ **Ministry of Covenant**

• Should include a provision for Mutual Ministry Review.

Letter to the Bishop

❖ **When the call is accepted, the Wardens should write a letter to the Bishop informing the Bishop that the Rector has been elected and has accepted the election and stating the "effective date" of the rectorship.**

• This is the date the Rector will be placed on the payroll of the congregation, although the rector may take up his or her duties at a later date. (The Rector may be allowed some time to relocate before beginning work in the congregation.)

The Vestry's Work During The Call Process

Lead through the change.

Invite the clergy to visit.

Work on salary.

See that the canonical documents are prepared.

Notify Bishop.

Plan the celebration of new ministry and transition.

The Process

How Long Will This Take?

❖ Episcopal Diocese of Texas

- Pre-search = 6 months
- Search = 6 months
- Call = 1 month

❖ National Searches

- 18 to 24 months

Where do Vestries and Committees go astray...

❖ Organization [Goals, Evaluation, Re-Visioning]

❖ Speed [Like cooking fudge]

❖ Underestimating Spiritual Component

❖ Who we want you to find vs. us discovering who God is calling

❖ Assuming

❖ “Male Answer Syndrome” Answering questions for which you do not have the answers