

Parish Transition Process for the Diocese of Massachusetts



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Guidance prayer for a parish in a search for a new clerical leader

O God, you know us better than we know ourselves. Guide us in our search for a new clerical leader. Empower each one of us to use our unique ministries, to share openly and honestly our thoughts, to respect the opinions of others, and to encourage humility, patience and joy. Instill in us a vision of the Church's mission that guided by your Holy Spirit we will be united in love and joyfully accomplish this mission of discovering the one you have called to serve with us as our *[rector]*. All this we ask through Jesus Christ our Lord. Amen.

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OUR MISSION

We, the people of the Episcopal Diocese of Massachusetts, are living members of the body of Jesus Christ. As Jesus gathered his disciples, took bread and blessed it, and then offered his body for us in order to bring reconciliation, forgiveness and healing, so may we offer ourselves in Christ's name.

Embracing brave change

Keep alert, stand firm in your faith, be courageous, be strong. Let all that you do be done in love. (I Cor. 16:13-14)

God is calling to us to look ahead and to embrace brave change. As fewer people turn to the church as a source of solace and strength, more than ever we yearn to know and be known by God and one another. In a world plagued by grievous conflict, injustice and poverty, God gives us the courage to be agents of reconciliation, justice and abundance. There will be difficult choices for us as followers of Jesus. It is only through ongoing, prayerful discernment together that we will find a path to a faithful future.

Reimagining our congregations

I am about to do a new thing; now it springs forth, do you not perceive it? (Isaiah 43:19)

With God's help, we can support our congregations as they reimagine the shape of discipleship in 21st-century Massachusetts. We believe in the power of Christian community to transform lives through God's grace, a promise that sustains us even as we adapt to meet the needs of a changing world. We will deepen our relationship with God and increase our capacity to speak of our faith. Rooted in a living tradition, we will joyfully and courageously invite all people to worship our Creator, to share the reconciling love of Christ and to participate in the work of the Holy Spirit.

Building our relationships

From Christ the whole body, joined and knit together by every ligament with which it is equipped...promotes the body's growth in building itself up in love. (Ephesians 4:16)

With God's help, we will address painful divisions within our diocese, that we might serve the world worthily as one body in Christ. Blessed by the manifold charisms of all of our diverse members and congregations, we will strengthen the bonding ligaments between individuals, congregations and diocesan bodies. Honoring the contributions of every generation and working across differences to build each other up in love, we will share our varied gifts with one another and our world.

Engaging our world

Just as you did it to one of the least of these...you did it to me. (Matthew 25:40)

With God's help, we will continue to engage our world, working alongside our neighbors to share Christ's love through word and action. We will act as agents of God's compassion to those in need. We will work to reconcile ourselves and all people to one another, and all of creation to God, seeking justice and committing ourselves to the stewardship of our planet.

Glory to God whose power, working in us, can do infinitely more than we can ask or imagine: Glory to God from generation to generation in the church, and in Christ Jesus for ever and ever. (Ephesians 3:20-21)

A Prayer for Mission

O gracious and loving God, you work everywhere reconciling, loving, and healing your people and your creation. In your Son and through the power of your Holy Spirit, you invite each of us to join you in your work. We, young and old, lay and ordained, ask you to form us more and more in your image and likeness, through our prayer and worship of you and through the study of your scripture, that our eyes will be fully opened to your mission in the world. Then, God, into our communities, our nation, and the world, send us to serve with Christ, taking risks to give life and hope to all people and all of your creation. We ask this in Jesus' name. Amen.

Dear Friends in Christ,

Before you plunge into this guide, step back for a moment and think about the major transitions in your personal lives. Pick one significant transition in your life: from being single to being married; from being married to being divorced; becoming a parent for the first time; a transition to a new vocation or job; a transition to losing a job; moving from middle age to old age; relocating your family to another part of the country; or any other significant transition in your life.

Now sit with those memories for awhile. Try to remind yourself of what you felt at that time of transition. Were you anxious? Hopeful? Afraid? Where did you find your support? What surprised you about the experience? What did you learn about yourself during this transition? What did you come to know about God during this experience?

Often, even a few minutes of reflection on transitions remind us that if we are open to the Holy Spirit, a transition can be full of God's grace and revelation. Remember all that Jesus learned of God's power and continuing presence in the wilderness when he left his relatively serene life in Nazareth in order to begin his public ministry (see Matthew 4:1-11; Luke 4:1-13; Mark 1:12-13).

Transition in parish communities and discernment of call by clergy from the moment the rector leaves until the institution of a new rector, and all the steps in between, can be an exciting grace-filled time. This guide is meant to support you during this time, and make possible the spiritual growth and renewal God desires for you as the opportunities presented by this transition unfold.

Your bishops, the diocesan staff and lay and clerical leadership of the Diocese of Massachusetts will work closely with you to insure that qualified candidates are considered at every step in the process. Because inclusivity is always a sign of vitality in the church, our bishops are committed to the thoughtful consideration in your discernment process of candidates of other cultures, candidates of color, women, people who are gay and lesbian, and the broad spectrum of theological opinion which is so much a part of The Episcopal Church. Recognizing the importance of clergy diversity to the life of the diocese as well as to the parish, the bishops may from time to time put forward candidates for consideration that fulfill this commitment.

Know of my prayers as you begin this time of exploration and discernment in the life of your parish.

Faithfully and fondly yours,

The Rt. Rev. Alan M. Gates

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INTRODUCTION		

This guide provides an overview of the transition that takes place in a parish from the time when one rector departs and a new rector is instituted. The main steps in the process of defining parish identity and calling new clerical leadership are outlined in the following pages as an aid to vestries, congregations and search committees in understanding this challenging period.

Throughout this time of discernment and change, the bishops, through the regional canons, support the parish by providing periodic consultation and written materials, identifying a supply, bridge and/or transitional priest in charge, recommending a search consultant to work closely with the search committee and offering other guidance needed to move successfully into the next stage of parish life. Trust and two-way communication between the parish and the bishops' office are essential elements of a successful search.

This document is intended as a road map of the transition process. It is not, nor should it be used as, a step-by-step guide. Each congregational situation is unique and should be treated as such. The parish transition period for purposes of this discussion can be understood in four stages:

- 1) Separation and Planning;
- 2) Congregational Assessment;
- 3) Search or Appointment Process; and
- 4) Call of the New Rector or Priest-in-Charge.

Statement of non-discrimination in employment in the Diocese of Massachusetts: It is an essential part of the mission and responsibility of the regional canons to assist congregations in transition during their discernment of new ministry and clergy leadership in the Diocese of Massachusetts. To that end, we make no distinctions on the basis of gender identity, race, disability, sexual orientation, age or marital status according to Canon III.1.2. The implications of this practice for your particular congregation should be addressed in the initial meetings with your regional canon.

SEPARATION & PLANNING

Notify the Bishops' Office

It is essential that the bishops and appropriate diocesan staff be a part of the process from the very beginning. The transition process begins when the departing priest meets with the appropriate regional canon and they determine together when the announcement to the vestry and congregation will be made. Generally, a minimum of four weeks notice should be given. In the case of a retirement, four to six months may be appropriate. As soon as the priest announces to the wardens the intention to leave a parish, the wardens will make an appointment with the regional canon to discuss the state of the parish as well as their options in the upcoming transition period. **(See Appendix B, On Leaving a Parish.)**

At this meeting, the wardens report generally on the congregation and are briefed in turn on what typically lies ahead for a parish in transition. **The wardens and vestry are the formal and canonical leadership of the congregation until a transitional or settled**

priest in charge is appointed; as such, they hold the responsibility of choosing a course of action best suited to their particular parish and situation. With the help of the bishops' office through the regional canon, the wardens will make arrangements for the conduct of worship and pastoral care until a transitional priest in charge is appointed.

After the initial meeting of the wardens with the regional canon, the regional canon will visit the parish. The visit may take the form of a meeting with the vestry and/or the full congregation. The regional canon will share the various search options (**see Appendix M, Search Options**) and provide an overview of the search process. Once the vestry and the regional canon jointly determine an appropriate search option, the regional canon will discuss what the parish can expect during the transition period.

Provision for Clergy Leadership During the Transition

Pursuant to the Constitution and Canons of The Episcopal Church, the bishop diocesan, in conversation with the wardens, appoints a priest to provide clerical leadership. Depending on the particular needs of the parish, the bishop diocesan (in consultation with the regional canon) will appoint either a transitional priest in charge, trained in transition ministry or, if appropriate, a priest-in-charge to serve the parish during the transition period. The appointment is confirmed (or not) following an interview with the vestry. For the sake of continuity, the bishop diocesan may recommend that a bridge priest be appointed and serve until a transitional priest in charge or a priest-in-charge is chosen. More information regarding bridge priests follows in the next section.

Occasionally, there may be an extended period of time between the priest's announcement of departure and the actual leave taking. At these times, it may be appropriate for the vestry to select a transition team. (**See Appendix G, Responsibilities of a Transition Team.**)

Guidelines for Parishes Served by a Bridge Priest

As noted above, congregations undergoing transition have the option of initiating a search for a new rector during which period a transitional priest in charge is assigned, or requesting that the bishop diocesan appoint a priest-in-charge.

In either circumstance, a congregation may wish to take a period of time to assess which path to choose. During such time the need for clergy may be filled by supply priests on a per diem basis, primarily to perform services on Sunday and/or on other occasions (e.g., weekday services, funerals and weddings, etc.). However, there may be circumstances where there is a need for more regular clergy presence and continuity during this initial period of transition. In those circumstances the bishop diocesan appoints a "bridge priest" for a specified period of time and hours per week to provide regular clergy presence and to perform agreed-upon duties in addition to regular leadership of Sunday and other services.

Appointment and Determination of Duties of a Bridge Priest

A bridge priest is appointed by the bishop diocesan in consultation with the vestry of the parish. The bishop recommends one person at a time for the position. If the vestry believes that the person nominated may not be a good fit for the parish, it may ask for another recommendation.

Typically, a bridge priest would be appointed for a specified period of time (e.g., a month, three months, etc.). However, the appointment may be extended. It also may be indefinite, contingent on the appointment of a transitional priest in charge or priest-in-charge. At the bishop's discretion, a bridge priest may be considered for appointment as a transitional priest in charge or priest-in-charge, subject to the approval of the vestry.

A bridge priest will have only the duties and responsibilities defined in the letter of agreement negotiated between the bridge priest and vestry. The regional canon is available to assist in this process, if requested. A useful resource for identifying all of those functions and activities that are considered important to a parish's life is: "Areas of Mutual Ministry Review" found at <https://www.diomass.org/file/32372> . During the tenure of a bridge priest, the authority within the parish lies with the wardens and the vestry.

Regular communication with the regional canon is encouraged. The regional canon may recommend the assistance of a consultant during various parts of the transition.

Bridge Priest Compensation and Benefits

A bridge priest's compensation and benefits, including health insurance and pension contribution, will follow the Compensation and Benefits Committee Guidelines using the Total Clergy Compensation (TCC) standard for the parish prorated according to the agreed number of weekly hours. The TCC worksheet, which can be found at <https://www.diomass.org/inside/docs/compensation-benefits-resources-congregations>, should be used to calculate the compensation and benefits for a bridge priest. All of the terms, including the length of appointment, number of weekly hours, and duties and responsibilities, should be incorporated in a **Letter of Agreement for a Bridge Priest (see Appendix D)**.

A transition review covering the parish's finances and other related matters will be completed immediately following the departure of the rector and in tandem with the appointment of a bridge priest, priest-in-charge or transitional priest in charge.

Transition Review

Whether a priest-in-charge or a transitional priest in charge is to be appointed, the regional canon, in consultation with the leaders of the diocesan congregational consultants, will assign a consultant at the beginning of the transition time, to meet with the wardens, treasurer and any other appropriate people. The consultant will help the congregation understand the state of its current business and financial practices, ensuring that such canonical requirements as parochial reports, audits and assessment payments are up to date. **A parish cannot call new clergy leadership until these requirements are all met.** A review of financial results, known as a transition review report (**see Appendix V**), may also help a congregation ascertain the scope of its future ministry, ensuring that the parish can properly compensate the new clergy person for the position the parish is seeking to fill. This report will be shared with

the final slate of prospective new clerical leaders before a call is extended. The diocesan congregational consultants are prepared to take the time to help guide a parish toward a place of financial vitality in preparation for new clerical leadership.

Saying Goodbye

The vestry, parish and rector together should plan and carry out the farewell and celebration of the rector's ministry. Whether the priest is leaving because of retirement, a call to another parish or even because of differences with the parish, the elements of the separation process remain the same. Much of the energy of the parish during this time should be devoted to saying goodbye. In the weeks prior to the rector's departure, the primary tasks are to arrange an exit interview, plan the current rector's departure and provide opportunities for people to say goodbye in a celebratory manner. **(See Appendix B, On Leaving a Parish; Appendix A, Exit Questions; and Appendix C, Liturgy for the Ending of a Pastoral Relationship.)**

CONGREGATIONAL DISCERNMENT

OPTION I: If a Transitional Priest in Charge is Appointed (See Appendix E)

When the parish and the bishop decide to do a search, the bishop will appoint a transitional priest in charge.

Roles and Responsibilities During the Transition and Search Process

A) The Search Consultant

A consultant experienced in rector searches is assigned by the regional canon to the parish. The search consultant is engaged by the vestry but is accountable to the bishops' office through the regional canon for the search process. The search consultant meets with members of the vestry at the beginning of the search process, explains the consultant's role in the process and then works primarily with the members of the search committee in guiding them through the search. Once the vestry decides to engage a search consultant, the vestry and the consultant develop and sign a memorandum of understanding that determines the search consultant's compensation and duties. **(See Appendix I.)**

The consultant works with the search committee appointed by the vestry (see the search committee appointment process in the following section) to plan and design protocols for the search. The consultant helps to prepare the parish profile and to fill out The Episcopal Church Office for Transition Ministry Community Portfolio and the Transition Ministry Conference (TMC) Open Position Form; gather and interpret data; and develop questions and a design for the interview process. The search consultant serves as the principal link with the regional canon in providing resources and guidance during the transition period and search process.

The consultant is essential to helping the search committee navigate the search process. While every transition is unique, it is helpful for the transitional priest in charge and search consultant to work together closely. E-mail communication among the transitional priest in charge, the search consultant and the regional canon should be copied to all three, and the transitional priest in charge and search consultant should determine a system for being in touch, whether through a monthly or bimonthly check-in or, at the very least, whenever the parish moves to a different stage in the search process (i.e. from “self-study” to “receiving names” to “no longer receiving names” to “interviewing finalists,” etc.). The greater the communication among all constituencies, the greater the opportunity for a smooth transition.

The parish is responsible to pay the consultant (**see Appendix O, Sample Budget for the Search Process**). If the cost of a consultant will place an undue burden on the congregation, the senior warden is encouraged to contact the bishops’ office through the regional canon.

B) The Search Committee

The vestry is charged with the formation of the search committee. The composition of the search committee should be people of prayer and discernment. They should reflect the parish’s diversity, including people of different ages, race and gender. Please note that this is not the time to recruit all those in the parish with human resource experience to become members of the search committee. Rather, the vestry should attempt to select people with open hearts and minds who will be sensitive to the culture and dreams of the congregation as a whole and not be driven by particular agendas.

It is not appropriate that ordained clergy who are affiliated with the parish, whether retired or still in active ministry, serve as a member of the search committee. Occasionally and only after consultation with the bishops may such a person serve as chaplain to the search committee, without vote.

It should not go without saying that openly disaffected persons are generally not helpful to a search committee, nor is it appropriate for a member of the parish staff, or a staff member’s spouse, to serve on a search committee.

A good target number for the search committee is eight to twelve members for a larger parish and six to eight members for a smaller parish, and at least one member of the vestry (whose term will cover the duration of the search) is encouraged to serve on the search committee as a liaison with the vestry. This serves the purpose of keeping members of each body informed and connected. We recommend that the wardens not serve on the search committee. The wardens, however, may observe search committee meetings when and as they wish. We strongly recommend that when it comes to the receiving names period, the wardens recuse themselves from further search committee meetings. (**See Search Committee Job Description, Appendix J.**)

C) Self-Study/Discernment

The bishops recommend a discernment retreat for the vestry and search committee early in a search process. The retreat encourages the participating members of both the vestry and search committee to view their work as a spiritual journey, over the course of which decisions are

made through prayer and reflection. The retreat is generally led by the search consultant and/or the regional canon.

A parish search prayer may also be developed by the search committee for use by the whole congregation that invites a spirit of thoughtfulness, collaboration and faith-building. Many committees ask one member to act as their “chaplain” so as to keep them spiritually grounded by beginning and ending meetings with prayer and encouraging the use of the parish search prayer by the congregation throughout the transition period. Some parishes have found it helpful for the vestry and search committee members to form prayer “partners” to pray for each other throughout the search.

In its first phase, the search committee will take an in-depth look at the parish—its history, its identity, its mission and goals. In a real sense, the parish first searches for itself before looking for a pastor: What kind of community is it? What kind of parish has it been in the past? What new shape is God calling it to become? How can the parish realize its vision of itself in the future and, ideally, under what kind of leadership?

This self-study is a kind of discernment of what the faith community is at its best, of the parish as the Body of Christ in a special configuration. It is at best an imagining of what God’s dreams are for the community of the faithful in a local context.

The search consultant gives counsel to the search committee throughout this important stage. The self-study can take many forms, inviting the whole parish to participate by:

- Holding an Appreciative Inquiry workshop;
- Conducting informational interviews within the congregation, in the community and with other churches (deanery and ecumenical community);
- Delving into archives for historical material;
- Gaining demographic information on the area in which the parish is located;
- Reviewing past history, written and verbal, as supplied by older members; and
- Envisioning the future in focus groups by imaginative and creative exercises.

THE SEARCH

Timeline

Depending upon the particular circumstances of each parish, a search may be as brief as nine months or extend to a year-and-a-half or more. The search consultant can be useful in setting up a realistic timeline designed to achieve a balance between efficiency and a pace that encourages thoughtful discernment, caution and thoroughness. (**See Appendix N for a detailed timeline.**)

The Vestry’s Charge to the Search Committee

It is important that the vestry give a written charge to the search committee determining the scope and extent of the search (**see Search Options in Appendix M, and Sample Charge**

from Vestry to Search Committee, Appendix K) as well as the budget for the search process itself (**see Sample Budget for Search Process in Appendix O**).

This charge should be in line with the canons of The Episcopal Church and the parish bylaws. Some vestries delegate the power of selection entirely to the search committee and accept its choice without meeting the candidate. The vestry should consult the parish bylaws at the time it issues its charge to the search committee to assure that the vestry's charge conforms to the bylaws.

Informed by the transition review report, the vestry also must decide on the range of the compensation and benefit package that it will offer the new rector. Diocesan policy stipulates that any full-time parochial priest must be paid at least the minimum Total Clergy Compensation (TCC) which includes salary and housing. Pension, health insurance and any other benefits are calculated in addition to TCC. Conversation between the search committee and the vestry about the specifics of salary, benefits and housing situation is vital in order to give an accurate description of the position to be listed by The Episcopal Church Office for Transition Ministry and to be very clear with potential candidates so the rector's tenure can begin in a healthy way. There are diocesan guidelines to be followed in setting the financial terms, a full description of which is available in the annual Guidelines of the Compensation and Benefits Committee, obtainable online at <https://www.diomass.org/inside/docs/compensation-benefits-resources-congregations> or from the regional canon.

The Commissioning of the Search Committee

The vestry presents the members of the search committee to the transitional priest in charge who commissions them before they undertake their charge. The commissioning appropriately should take place during a Sunday worship service to liturgically signal the significant responsibility and role search committee members are assuming in the life of the parish. (**See Appendix C, Sample Liturgy for Commissioning a Search Committee.**)

The Parish Profile

The first task of the search committee is to work with the vestry and the entire congregation to develop the written profile or "story" of the parish (details such as parish history, a listing of programs, parish ministries and personnel). This first task can take up to six to eight months. When the profile is complete, the search committee brings it to the congregation to reflect on whether that document represents them. The search committee then takes it to the vestry for approval. Once approved by the vestry, the search committee should send the profile to the regional canon for review. Parishes then post their profile on their own website. The same profile will be posted on the diocesan website at [www.diomass.org/resources/parish clergy support/clergy transition](http://www.diomass.org/resources/parish_clergy_support/clergy_transition) (**see Appendix P, Parish Profile Outline**). It is important to remember that the parish website is the first place potential candidates will visit and so it should be current and inviting.

The description of the parish contained in the profile is meant to be a representation of the parish on which the wardens, vestry, search committee and congregation agree. In the experience of reflection and self-definition, a parish grounds itself in its own reality. The more

honest and transparent a congregation is in telling its story, the greater its chance of attracting appropriate candidates and the smaller its risk for experiencing disillusionment following the call. It is important to note that the profile is not meant to delineate the projected abilities of a new priest.

The profile must be in PDF format in order to be uploaded to the diocesan website. The profile may be created in a number of different programs but must be able to be saved as a PDF.

Filing the Episcopal Church Office of Transition Ministry (OTM) and Transition Ministry Conference (TMC) Community Portfolios

Concurrently with the creation of the profile, the search committee should be working on completing the OTM and TMC profiles. The worksheets for these profiles will be provided by the search consultant. Much of the information gathered for the creation of the parish profile can be used for these profiles. Both documents should be completed before either of them is sent to the regional canon for comment and review. The regional canon is responsible for uploading these profiles.

The narrative questions for the OTM each have a length limit of 1,200 characters, not words. This includes spaces and punctuation. Microsoft Word has a character counting feature that is easy to use. Once the parish community portfolios are published, they will be available through the OTM website to priests throughout The Episcopal Church who are in active search. Parishes may choose to post their listing on the Episcopal News Service – Jobs and Calls page found at <https://www.episcopalnewsservice.org/postjob/>.

At this point the parish is said to be “receiving names” and begins accepting applications from interested priests.

Receiving Names

Once the search committee begins receiving names, it asks the potential candidates to send supporting materials such as resume or CV and their OTM Ministry Portfolio. The search committee may receive names from the following sources:

- Candidates themselves, who submit their applications directly to the search committee;
- Parishioners and/or others who know good candidates, who can ask them to submit their applications to the search committee;
- The bishops, through the regional canon, may encourage particular candidates to apply.

Communication and Confidentiality

Communication with the parish is essential. While the conduct of the deliberations and the names of nominees are confidential, it is important that the search committee communicate on

a regular basis the progress of the search process, even if that means simply informing the congregation that the committee will not be meeting for several weeks.

Confidentiality is not secrecy. The search committee and the vestry must assure the congregation that the transition period is going well and that progress, however seemingly invisible, is being made. Otherwise, the parish may complain that “nothing is happening.” The chair of the search committee should give oral updates during announcement times or parish functions. If new members are elected to the vestry in the course of the search process, it is important to bring them up to date on the status of the process.

Members of the search committee should understand how important it is to maintain confidentiality, as often prospective candidates have not yet informed their own congregations that they may be in search. For search committee members to do otherwise is to risk great damage, both to the candidates and to their congregations. It is very harmful to the integrity of the process if a search committee member shares information with anyone in the parish, including a spouse or other family member, during the course of the search process. It is equally important to provide for the security of search committee files.

Narrowing the Field of Candidates

Once the period of receiving names has passed, generally four to eight weeks, the search committee’s task is to sort through the candidates’ material efficiently and yet not arbitrarily, in order to narrow the field and to create a “long list” of eight to twelve serious candidates. The search committee reviews the candidates’ initial materials. Eliminating candidates on the basis of the Episcopal Church OTM profile alone is not recommended unless it is clear from a close reading that the candidate is unsuitable (**see Appendix Q for Sample Questions**). The search consultant’s guidance is beneficial to following a process that is both thorough and faithful.

Once the search committee has developed the “long list,” it should submit the list to the regional canon, along with the names and the dioceses in which the candidates are canonically resident and/or in which they are serving. The regional canon and the bishops review the list of priests and conduct a preliminary “red flag” check. Through that process, the regional canon and bishops are alerted to any issues that might prevent a priest from being considered. At the same time, there may be candidates who have significant gifts that are not apparent on paper, and the bishops, through the regional canon, may share this information with the search committee where appropriate. **The regional canon will communicate regularly with both the bishops and the search committee throughout the process. The bishops reserve the right to add names if the list does not reflect the diocesan commitment to diversity.** The goal is to ensure the richest possible pool of potential candidates for the search committee to consider.

As the bishops and the regional canon are discussing the search committee’s long list of candidates and conducting the red flag check, the search committee is beginning to screen its long list of candidates by soliciting recorded and/or written sermons for the committee to hear or read, and conducting telephone, Skype or Zoom interviews. Once it is reduced to a short list of four to six names, in consultation with candidates, search committee members should plan to review references and attend worship services in the candidates’ own congregations or

ministry settings. **(See Appendix Q for Interviews, Interviewing Finalists & Various Sample Questions.)** The number of visits is usually driven by time and cost – (e.g. if candidates are all serving in local congregations it is much easier to plan a visit). Committee members should be discreet when making such visits. No more than four persons, preferably two, should visit since the congregation likely is not aware that its priest is engaged in an active search.

The search committee should also request, from the regional canon, background checks on these candidates, which will be performed by the Oxford Document Management Company.

Oxford Document Background Check

Background checks concerning misconduct and criminal offenses are required for all clergy at any point of transition (pre-ordination, licensing and employment) in the Diocese of Massachusetts. This differs from the preliminary background screening performed by the regional canon that simply insures that candidates are priests in good standing.

The time needed to complete a background check may be as long as three months. It is important for the search committee to understand that the Oxford Document Management Company cannot initiate a background check until it has received the signed forms from the candidate.

The parish is responsible for the cost of background checks, which vary depending on whether the candidate has previously completed a background check within three years for the Diocese of Massachusetts or for Province I (New England). The cost of a full background check is \$165. If the person is canonically resident in Province I (New England), the result of a prior background check may be transferred (if performed within the past year, at a cost of \$55) or updated (for a cost of \$85 if the earlier check occurred more than one but less than three years ago. If more than three years ago, a new background check must be performed for \$115 if the earlier check was more than five years ago).

Throughout the screening process, the search committee, as a courtesy, should notify in writing those candidates whose names are no longer under consideration by the parish. It is important to remember that clergy in search often put their lives on hold or have to make important decisions with respect to their and their families' lives as their own search processes unfold. Not informing them, in a timely manner, about the progress of the search shows a lack of consideration for the candidates and also reflects poorly on both the parish and the diocese at large.

The Short List

When the search committee has arrived at its final list of two or three names, it should report those names and full contact information to the regional canon. It is the usual practice of the search committee to invite the final candidates to meet with the search committee at the parish. By reviewing the Episcopal Church OTM parish or community portfolio, candidates are acquainted generally with the financial terms the parish may offer, but during the final interview stages, discussion of the financial package should take place. The search committee

should make candidates coming from outside the diocese particularly aware of the high cost of living (especially housing) in Massachusetts and also share the transition review report. **(See Appendix R, Ground Rules for Finalists' Visits to Parish.)**

Short List Search

After a transition review is completed, the regional canon meets with the vestry to explore search options. This option would be offered especially in situations where the congregation does not have the resources (financial or human) to undertake a full search. It is offered to all congregations in search. This process requires a level of trust between the vestry, regional canon and bishop to select the best candidates to forward to the parish.

A transitional priest in charge or bridge priest is hired by the wardens and/or vestry. A search consultant is appointed by the regional canon.

The vestry acts as the search committee. The vestry chooses a chair and/or co-chairs from among the vestry members to guide the search process. Neither of the chairs is a warden.

If the position is less than half time, it is expected that collaboration with other parishes will be explored.

The search chair (or co-chairs) reviews options and establishes a process to engage the congregation in a discernment conversation. It is hoped that these would be in-person, small group discussions led by the vestry focused on questions and activities such as the following:

Who are we when we are together?

Who are we in our community? How does our community see us?

Walk through the neighborhood and approach your church with fresh eyes.

What do you see? Speak with your community leaders about how you are viewed. Who do we want to come and be among us? What do we want them help us to do? "The next season of our parish life will require....?"

Name why each attribute for the new clergy person is important to the parish.

Make a Sunday visit to a neighboring parish and take pictures of what is inspiring and interesting and might work at your own parish, and invite members of that congregation to come to your parish as well.

The search chair(s) will gather all the information from the congregation and create a short (five-to-seven page) profile. A simple profile template is provided. The vestry will review and approve the profile. The chair(s) complete the Office of Transition Ministry (OTM) and the Transition Ministry Conference (TMC) questionnaires.

The profile and the OTM and TMC questionnaires are posted by the regional canon, asking all interested applicants to forward materials to the regional canon.

The regional canon does a "red flag" check of applicants from outside the diocese and reviews applicants from inside the diocese. In consultation with the bishops and canons, a short list of applicants (no more than five) is developed and forwarded to the vestry.

The vestry begins the interviewing process with all candidates who were forwarded to it. It is expected the rest of the process would follow as described earlier in the document, and could include telephone or Skype interviews, on-site visits to candidates and candidate visits to the parish.

Final Discernment

The final stage of selecting a nominee is one of close scrutiny, prayer and reflection. When the search committee reaches the time for consideration of the final candidates, a special time of prayer should be set aside before, during and at the end of the final discernment. Each search committee will, with the help of its search consultant, determine how to conduct this final discernment.

In the rare case that a search committee cannot reach consensus, the search consultant and regional canon, in consultation with the bishops, will suggest strategies for reaching consensus. If no final consensus can be reached in order to recommend a final candidate to the vestry, the search committee chair(s), in consultation with the wardens, must decide on one of the following courses of action:

- 1) Reopen receiving names again with the current search committee.
- 2) Reconfigure the search committee and discern what part of the process from which to begin again (i.e. if the profile needs to be revised, the process would begin there).
- 3) Ask the bishop to appoint a priest-in-charge.

Bishop's Meeting with Final Candidates

At this stage, the search committee chair(s) will contact the bishops' office to schedule a meeting between each of the candidates from outside the diocese and the bishop. The purpose of this meeting is to acquaint the candidate with the Diocese of Massachusetts and to establish a relationship with a bishop of the diocese. This normally is done during the candidate's visit to the parish for the personal interview with the search committee. The bishop may choose to give feedback to the search committee after meeting with the candidates. **Search committees need to understand that the bishops' schedules are often heavily booked and therefore should make their requests for appointments at least a month in advance of the candidates' visits.**

THE CALL OF THE NEW RECTOR

The Call

Once the search committee comes to consensus on the candidate it recommends to be the next rector of the parish, the name is presented to the vestry for consideration and to issue a call to be the rector. Depending on the process to which the vestry has earlier agreed, through its charge to the search committee, exposure to the candidate by the vestry is very important. The regional canons recommend that vestries meet the finalist(s) informally at a social occasion

during their visit to the parish. This is not an interview, just a chance to meet and greet one another.

Before issuing a call, the vestry must notify the regional canon, who will inform the bishop of the election and seek approval of the call. As required by the Constitution and Canons of The Episcopal Church, **no call may be issued or announced without the consent of the bishop.** Upon receiving the bishop's approval, a call is then issued, a privilege traditionally enjoyed by the wardens. Following that phone conversation, a covenant of ministry is crafted and signed by the rector-elect, the clerk or wardens, the regional canon and the bishop. **No announcement of the call is to be made by any of the parties until a covenant of ministry is signed.** Announcement of the call needs to be scheduled to everyone's convenience and, ideally, simultaneously in each place. It is important to remember that the candidate will need time to review the proposed covenant of ministry and inform leaders of the congregation or ministry that the candidate will be leaving.

The Covenant of Ministry

Details regarding the rector's terms of employment (amount of cash stipend, housing arrangements or allowance, moving expenses, benefits, description of responsibilities) are negotiated with the wardens with approval of the vestry and these terms are later spelled out in a formal covenant of ministry which is drawn up by the rector-elect and the vestry, represented by the wardens and the clerk. Before obtaining the necessary signatures, it is required that the wardens e-mail the draft to the regional canon for review. Once reviewed and approved, by all parties, the final version is e-mailed in a .pdf form to the regional canon to be sent back to all for electronic signatures. Its signing completes the process and concludes it formally. It is recommended that this covenant of ministry be customized as much as possible and the final copy be printed on the parish letterhead.

A sample template is available at <https://www.diomass.org/transition-ministry-resources>. It is expected that the template will be used for all covenants of ministry. It also appears in **Appendix S.**

The wardens will contact the diocesan human resources staff member for information regarding medical insurance and change of status for the Church Pension Fund. To facilitate a smooth arrival, the new rector should have this information available upon arrival.

Honoring the Search Committee/Celebrating the Transition

Material left over from the search should be shredded or discarded in a secure manner since much of it is confidential in nature and inappropriate for parish archives. Feedback from the search consultant on the experience of the search process and any aspect of it should be solicited by the search committee. Successful completion of the work of the search committee is also cause for celebration either in the context of a parish event or simply by the committee itself.

Recognition of the ministry of the transitional priest in charge and bidding that person goodbye merits the attention of the congregation at the end of the transition period. **(A sample farewell liturgy is found in Appendix T.)** The regional canons encourage the departing

transitional priest in charge to make an appointment for both an exit interview and to discuss future plans.

Welcome

When the call has been issued and accepted, it is appropriate for the vestry to appoint (if it has not been done at the beginning of the transition) a transition committee to serve as a committee of welcome, to introduce the new rector and family to the community, to help in relocation and to assist in the beginning of the new ministry. The transition committee might plan coffee and dessert for small groups to assist the new rector in meeting people, for example, provide groceries for the first week, see to it that the rector's office is ready to be occupied and/or provide contact information (**see Appendix U, To Welcome the New Rector**). The regional canon will notify the dean of the deanery, so that the dean may welcome the new rector as well.

Usually, the new rector is already employed in another ministry and must allow time for a responsible departure, which includes setting a date in conjunction with the bishop and vestry, saying goodbyes, perhaps for a bit of vacation, and for packing and moving before the new ministry begins. It is often at least two months, occasionally longer, after acceptance of the call before the new rector is in place.

The Service of Celebration of a New Ministry and Institution of the New Rector

It is customary that shortly after the arrival and settling in of the new rector for the parish to schedule a Service of Celebration of a New Ministry and Institution of the New Rector. Most parishes use the rite found on page 559 of *The Book of Common Prayer*. The bishop normally officiates and may wish to preach at this service. The parish should be in touch with the bishop's office so that a date is reserved on the bishop's calendar as soon as possible. Clergy of the deanery should be invited to attend and to participate as appropriate. This is a way of symbolizing collegiality in ministry and the connection of the parish to the wider church. The vestry should invite those people who have been helpful throughout this process, including the search consultant, the transitional priest in charge, the regional canon, diocesan staff and any clergy (if desired) who have served the parish during the transition and prior period.

Conclusion

At last, the new rector is in place. This is, in itself, a significant accomplishment, but it is hoped that it is not the only benefit a parish has received from its involvement in the search process. Many parishes report discovery of exciting new dimensions in their ministry, an increased sense of identity and purpose, newly identified resources in lay leadership or a new recognition of its relationship with the bishop and the wider church. May all these blessings be yours, and many more.

WHO'S WHO AND DOES WHAT DURING THE TRANSITION PERIOD

The Bishop

The bishop diocesan has ultimate responsibility for the ministry of all congregations in the diocese. In a time of transition, the bishop may meet with and advise the wardens as soon as the rector announces departure, either in person or through the regional canon. The bishop suffragan meets with the departing rector for an exit interview, assigns diocesan resources to assist in the process, approves all final candidates and approves the election of the new rector. Ultimately, the bishop institutes the new rector.

The Wardens

The wardens are the chief lay officers of the parish, responsible for many of the affairs of the parish in the absence of a rector. When the knowledge of an opening occurs or is imminent, the wardens notify the office of the bishop and maintain communication with the regional canon throughout the process. The wardens are responsible for working with the regional canon to obtain a transitional priest in charge and/or supply clergy; preside at the election of the rector and communicate that election to the bishop through the regional canon; negotiate on behalf of the parish with the newly called rector; and assist the new rector as new ministry begins.

The Vestry

The vestry chooses the search committee; approves the diocesan appointment of the transitional priest in charge or other transition clergy and the search consultant; prepares the budget for the search process; and formulates the charge to the search committee. The vestry assists the parish in participating in the process and, when the process is complete, may elect the new rector subject to the parish's bylaws. The vestry also sets goals in the covenant of ministry and then takes part in a mutual ministry review one year after the new rector begins the new ministry.

The Regional Canons

The regional canons are the bishop's deputies in dealing with parishes during the time of transition. The canon assists the vestry in appropriate closure of the out-going priest's ministry; assists the wardens and vestry in planning the transition process; assists the bishop in appointing the business consultant, the transitional priest in charge and the search consultant. The regional canon coordinates with the Episcopal Church Office for Transition Ministry, screens and consults with the bishop about prospective candidates and provides resources and training for transitional priests in charge and search consultants. The regional canon provides resources and advice for the search committee, vestry and wardens, keeps the bishop informed of the progress of all searches and assists in the call of the new rector. The regional canon may assist in the negotiation of a covenant of ministry with the new rector.

Business Consultant

A business consultant is assigned by the regional canon in coordination with the conveners for congregational consultants. They help the congregation understand the state of its current business and financial practices, ensuring that such canonical requirements as parochial reports, audits and assessment payments are up to date. The transition review report also helps a congregation ascertain the scope of its future ministry, ensuring that the parish can properly compensate the new clergy person for the position the parish is seeking to fill.

Search Consultant

The search consultant works with the wardens, vestry and search committee throughout the time of transition. They assist the parish in evaluating their strengths and resources, in identifying goals, in dealing with conflict and in negotiating the procedural aspects of the search. The search consultant works with the transitional priest in charge, the regional canon and, with their assistance, identifies and responds to any needs and problems that emerge as the process unfolds. The search consultant is the principal resource and point of communication between the vestry, the transitional priest in charge, the search committee, the regional canon and the bishop.

Search Committee

The search committee fulfills the charge of the vestry by conducting the search for a new rector. Working with the search consultant, the responsibilities of the search committee include determining the means of self-assessment and carrying out that assessment in order to write a parish profile; developing a system for screening, evaluating and notifying candidates as candidate materials are received; determining the various interview processes—written, phone and face-to-face; and communicating regularly with the regional canon in order that the various screening processes may be conducted.

Transitional Priest in Charge

In the Diocese of Massachusetts the term “transitional priest in charge” is used for those trained and experienced in the ministry of transition. The terms and conditions under which a transitional priest in charge is employed may vary with local circumstances, but generally the responsibilities include the conduct of worship, the continuation of pastoral ministries, support of programs and whatever else contributes to normal parish program. The transitional priest in charge is specially trained to assist a parish to evaluate its mission and ministry, to make any needed changes in parish administration or program and to help the parish prepare for the arrival of a new rector. This work is done in consultation with the wardens, vestry, search consultant and other parish leaders. The bishop, through the regional canon, appoints a transitional priest in charge, with the consent of the wardens and vestry. **According to diocesan policy, under no circumstances can a transitional priest in charge be considered as a candidate for rector.**

Deans

The Diocese of Massachusetts is divided into twelve geographical units known as deaneries. The bishop diocesan appoints a member of the clergy as dean to carry out certain pastoral, convening and communication responsibilities. The dean should be informed when clergy announce that they are leaving a position, when possible, take part in their leave-taking. They should welcome new transitional priests in charge and settled priests-in-charge and call on the new rector of a congregation as soon as possible. The dean may, at the bishop's request, preside at the service of Celebration of New Ministry and Institution of the Rector.

The Episcopal Church Office for Transition Ministry

The Episcopal Church Office for Transition Ministry is a registry for all clergy whether or not they are actively seeking positions. Computer files are maintained which show, among other things, the clergy person's work experience, areas of special interest, expertise or training and developed skills. This data is presented in the form of a ministry portfolio. Portfolios for all clergy registered in the system are available through the regional canon. Information about the parish, in the form of a community portfolio, is also filed with The Episcopal Church Office for Transition Ministry where it is made available to interested clergy.

SAMPLE PARISH SEARCH CHECKLIST

- _____ Notification of rector's departure
- _____ Date of announcement ____/ ____/ ____ Expected date of departure ____/ ____/ ____
- _____ Wardens' visit with regional canon ____/ ____/ ____
- _____ Visit to vestry by regional canon ____/ ____/ ____
- _____ Search materials received (search guide, compensation guidelines)
- _____ Transitional priest in charge identified and in place ____/ ____/ ____
- _____ Search consultant identified ____/ ____/ ____
- _____ Congregational consultant appointed for transition review ____/ ____/ ____
- _____ Search committee formed and commissioned; vestry's charge given
- _____ TMC Open Position Form filed with the regional canon
- _____ Parish profile completed, reviewed and copy sent to regional canon
- _____ Episcopal Church Office of Transition Ministry Community Portfolio filed
- _____ Search committee begins receiving names; applications acknowledged
- _____ Search committee narrows the field to "long" list of ten to twelve names

- _____ “Long” list identified and sent to regional canon for “red flag” checks
- _____ Candidates not selected are notified
- _____ Preliminary “red flag” check completed; Oxford Document checks initiated
- _____ “Short” list (three to four names) submitted to regional canon; bishop-to-bishop conversations arranged
- _____ Bishop meets candidates on “short” list
- _____ Final candidate name given by search committee to vestry (parish) for approval
- _____ Bishop approves the call of selected candidate
- _____ Call extended to _____ on ____/ ____/ ____
- _____ All other candidates informed of call
- _____ Covenant of Ministry/Letter of Agreement negotiated, signed and sent to regional canon
- _____ Plans for transition committee
- _____ Start date ____/ ____/ ____
- _____ The Service of Celebration of New Ministry and Institution of the New Rector scheduled on ____/ ____/ ____

OPTION II: When a Parish and the Bishop Determine that the Appointment of a Settled Priest-in-Charge is Appropriate

In some challenging circumstances, after the completion of a transition review and in conversation with the regional canon, the vestry may request the bishop diocesan to appoint a settled priest-in-charge (PIC). Examples of challenging circumstances include conflict, the removal of a clergy person due to misconduct, sudden clergy death or trauma, or financial instability, any of which might indicate that a tenured call is not advisable at this time.

A settled priest-in-charge is appointed by the bishop after consultation with the vestry and exercises the duties of Canon III.9.6 subject to the authority of the bishop. (See Reference I at the end of this document.) A settled priest-in-charge generally is appointed for a three-year time period during which the parish works on very specific, clearly articulated goals. At the end of this time the settled priest-in-charge may be called as rector **(see A Timeline with Milestones for Priest-in-Charge's Ministry and the Guidelines for Parishes served by a Settled Priest-in-Charge; not part of this document)**.

Once the vestry and bishop diocesan have agreed to the appointment of a settled priest-in-charge, a priest-in-charge consultant is appointed. The vestry then creates a two-to-three page description of the parish history, life and current ministry, financial information and a brief description of the full or part-time position. This description is shared with the regional canon prior to posting on the diocesan and/or Episcopal Church Office of Transition Ministry websites.

Interested clergy will submit materials to the regional canon who will perform "red flag" checks on candidates outside of the diocese. All candidates from outside the diocese must have current Oxford Document checks. These are ordered by the diocese and paid for by the parish. Candidates from inside the diocese will have a current public records check and all candidates must have current Safe Church training certification.

The regional canon, in consultation with the bishops and canons, creates a prioritized list of candidates to be considered. Candidates without the needed experience or skill for the congregation are notified by the regional canon that they will not be considered. One candidate at a time will be offered to interview with the vestry.

The regional canon forwards the resume and OTM profile of the primary candidate to the wardens of the parish. The wardens have a phone interview with the candidate. If the wardens believe the candidate is a good match, they may then invite the candidate to interview with the vestry. The vestry votes whether to accept the appointment. If the vestry declines the appointment, the wardens inform the regional canon who forwards the resume and OTM profile of the next candidate to the wardens.

If the vestry and the recommended candidate agree that there is a match, a Letter of Agreement setting forth the mutual obligations and responsibilities of the priest-in-charge and the vestry is negotiated in consultation with the regional canon. A standard Settled PIC Letter of Agreement is included as **Appendix W** of this document and in accordance with the diocesan clergy compensation guidelines available online at

<https://www.diomass.org/inside/docs/compensation-benefits-resources-congregations>. The appointment is official upon the determination of mutual fit and becomes public knowledge upon approval by the bishop of the Letter of Agreement. A settled priest-in-charge may begin as soon as the agreement with the vestry is reached, provided the negotiations were facilitated by the regional canon.

Term of Appointment and Authority of Settled PIC

A PIC appointment is usually for a period of three years, subject to modification only with the approval of the bishop.

With the approval of the bishop, a settled PIC may become a rector following a period of mutual discernment undertaken after two full years. The PIC consultant's help in this process is highly recommended. A mutual ministry review facilitated by the PIC consultant has to be done every year; a copy of the report should be sent to the regional canon.

It is expected that within six months of the appointment, the vestry and settled PIC will jointly establish mutually responsible short-term and long-term expectations and goals for the mission and ministry of the parish.

A time for mutual ministry review by vestry and clergy must be set forth in the Letter of Agreement.

Priest-in-Charge Consultant

The regional canon will also assign a priest-in-charge consultant to work with each parish served by a settled PIC. The consultant is available as a resource to the priest and the wardens and vestry through the first two years and then able to walk through the third year of discernment. (A PIC Consultant Handbook is provided to the PIC consultant, settled PIC and the wardens at the time of the PIC consultant appointment.) All PIC consultants are trained as coaches, search consultants and/or business consultants, and thus understand the dynamics of congregational development and transition. There is no charge to the parish for the service of the PIC consultant.

Stages During the Settled PIC Period

(See Guidelines for Parishes served by a Settled Priest-in-Charge, not part of this document.)

Although each congregational situation is different, there are recognizable stages throughout the service of a settled PIC:

- **Introductory Stage** (lasts nine to twelve months): Getting to know each other; building relationships; becoming familiar with the rhythm of life together; identifying conflicts/challenges.
- **Trust Stage** (lasts nine to twelve months): Building trust; developing confidence in working together; beginning to do some future planning.

Common characteristics: People may really like the clergy (and vice versa). There is often a feeling that “We’ve done all we need to do.” Be wary of making commitments too soon.

- Discernment Stage (often the beginning of year three and lasts six to nine months): Vestry/parish and clergy are visioning/discerning in relation to one another.

Common characteristics: Vestry (or designated committee) undertakes a period of intentional self-study addressing such questions as: Where are we? What is our mission/ministry? What kind of clergy leadership do we need/want?

- Post Discernment Stage: Is this PIC the right person to continue as rector? (Clergy should also be doing their own discernment about a call to the parish, asking, for example: Do I have the gifts they need?)

Options at this point:

1) Request that the PIC be called as rector. A Covenant of Ministry is created and a date set with bishop’s office for a Service of Celebration and Institution of a Rector.

2) Settled PIC completes term of agreement and a transitional priest in charge is appointed and the parish enters the search process previously described in this guide.

- Closure Stage (final six to nine months): If the settled PIC is called as rector, the focus becomes setting short and long-term goals and strategies. If the settled PIC is not called as rector, a formal search process or new form of transition begins under the settled PIC or a transitional priest in charge.

Exit Interview Checklist for Out-going Priests

In order to share important information with the incoming bridge priest or transitional priest in charge, please answer the following questions on this form and send it to your regional canon. Your responses will be shared with the new priest, in confidence.

1. Your name:

The name of your parish:

City/Town:

Date:

2. Describe any administrative issues that may require prompt attention by the new priest.
3. What do you think are current parish strengths and current weaknesses that may require special attention?
4. What “special parish history” does the new priest need to know about?
5. Are the parish’s finances in good order? Are there financial issues that need immediate attention?
6. Describe current parish staff along with any particular issues regarding their employment, tenure and performance.
7. Which lay persons are especially reliable and for what?
8. Which lay persons are good leaders, good at follow-through and mature in their faith and practice?
9. Which parishioners need special attention?
10. Provide names, addresses and phone numbers of any individuals who will need pastoral attention during the first few weeks of the new priest’s tenure.
11. Provide a list of parishioners who are sick or shut-in if not included in #10.
12. Describe any special pastoral routines including nursing home services, etc.
13. Describe current parish policies regarding baptisms, weddings and funerals.

14. Describe current parish policies regarding building and equipment use.
15. Describe any quirks in the liturgical practices of the parish that the new priest should know about.
16. What ecumenical relationships does the parish currently maintain?
17. What community relationships does the parish currently maintain?
18. What are two things you fear might be lost or lose momentum during the transition period?
19. Other concerns?

On Leaving a Parish: Pastoral and Practical Guidelines

These guidelines are intended to help clergy manage the termination of a ministerial relationship in a way that celebrates what has taken place and brings a sense of closure between priest and parish. Each situation, of course, is unique and presents its own challenges, but the principles underlying a good ending are constant. Saying a healthy, caring and clear goodbye to a congregation helps effect a good beginning to the next chapter in one's vocational life as well as in the life of the congregation.

A. Pastoral Guidelines for Clergy Taking Leave of a Parish

When Jesus took leave of his earthly ministry, he called his disciples friends and gave them a new commandment: “love one another as I have loved you.”¹ Jesus’ disciples are called to abide in communities of love, loving one another and reaching out in love to the world. Jesus’ call to love is woven through the liturgy of Holy Baptism. The candidates for baptism are asked, “Will you seek and serve Christ in all persons, loving your neighbor as yourself?”² And the gathered community prays that God will “teach them to love others in the power of the Spirit” and “send them into the world in witness to your love.”³

Jesus’ call and invitation to love are also reflected in the liturgy for the ordination of a priest and in the liturgies of welcome for a new rector. In the examination of the ordinands, the bishop reminds them that they are “to love and serve the people among whom [they] work....”⁴ That call is echoed in the service for the Celebration of a New Ministry, wherein the bishop prays that the new minister may “love and care for your people....”⁵ And in the liturgy for the “Welcoming of a New Rector” in *Enriching Our Worship*, the bishop says at the end of the service, “I commend to your love and care the people of _____. My brothers and sisters in Christ, I commend to your love and care your new rector, colleague and friend, N.”⁶

Our common prayer informs and illumines every aspect of our life together in the Church. As our liturgy makes clear, bonds of affection are naturally formed in Christian communities, grounded as they are in Christ’s love and his commandment to love one another. When clergy take leave of a parish, though the bonds of affection may remain, there is also a need to be clear that their pastoral relationship with parishioners is completed when they depart. The leavetaking guidelines of the Diocese of New Jersey honor both realities: “The guidelines recognize that, during the tenure of a pastoral relationship, genuine and often lifelong relationships are formed and that there remains a need on the part of the priest and some former parishioners to maintain these longstanding, meaningful friendships. However, it should be noted that clear distinctions between the pastoral identity and the identity as

¹ See John 15.12-15.

² From the service of Holy Baptism in *The Book of Common Prayer*, p. 305.

³ Ibid., pp. 305-306.

⁴ From the service of The Ordination of a Priest in *The Book of Common Prayer*, p. 531.

⁵ From the service of Celebration of a New Ministry in *The Book of Common Prayer*, p. 560.

⁶ From the service of The Renewal of Ministry with the Welcoming of a New Rector or Other Pastor in *Enriching Our Worship* 4, p. 10.

personal friend must be clarified and appropriate boundaries concerning the former must be established.”⁷ This clarity helps the priest who succeeds the departing priest to exercise ministry fully, free to love and serve those with whom that priest ministers.

In a review of the clergy leave-taking guidelines of twenty dioceses⁸, several practices appeared regularly. These practices, shown below, help departing clergy to let go of their pastoral responsibilities and make clear that their pastoral relationship with parishioners has ended.

- Write a letter to the congregation in which you let parishioners know that after you leave, you will no longer serve as their pastor or priest; that it no longer will be your role to officiate at their baptisms, weddings and funerals; that you will not discuss parish business with them; that you will not post on parish social media sites; and that you will return to the parish only at the invitation of your successor when the time is appropriate. **(See the Template for Letter Announcing a Priest’s Departure from a Parish that follows.)**
- If asked by a former parishioner to officiate at a baptism, wedding or funeral, be careful not to say that the person will need to check with the transitional priest in charge or new rector. It is always the responsibility of the departing priest to make clear that the pastoral relationship has ended.
- Be intentional about reflecting, grieving and preparing for whatever is next in your life and ministry.
- Refrain from conversation with former parishioners about parish matters, so that you do not become triangulated with parishioners and your successor.
- Refrain from involvement with the search process, including giving names or offering opinions about candidates.
- Worship in a different church.
- Disengage from all parish-based social media platforms.

Template for Letter Announcing a Priest’s Departure from a Parish

Dear Parishioners of [*Parish*],

I am writing to let you know that I have been called as rector of [*new parish*] in [*place*]. [*This opening can be modified to reflect other reasons for leaving, i.e. retirement or resignation.*]

⁷ From “Leaving Well Guidelines - Clergy Leave-Taking” on the Diocese of New Jersey website (accessed October 2015).

⁸ The clergy leave-taking guidelines of the following dioceses were accessed on diocesan websites in October 2015: Atlanta, Chicago, Connecticut, Delaware, Georgia, Lexington, Long Island, Michigan, New Jersey, New York, Newark, Olympia, Oregon, Rhode Island, Virginia, Washington, Western Louisiana, Western Massachusetts, Western New York and Western North Carolina.

My last day at [parish] will be [date]. As I prepare to take leave of [parish], please know that I value the friendships and ministry, the joys and sorrows we have shared, and our growth in the love of Jesus. *[It may be helpful to reflect briefly here on particular ministries or events that have special meaning for you.]*

After leaving [parish] on [date], I want you to know that I will no longer have a pastoral relationship with you. You will have a new pastor in your midst, and so it will no longer be my role to officiate at baptisms, weddings or funerals for parishioners of [parish]; that privilege will belong to [new priest]. I will also take care not to talk about parish matters with you; those should be discussed with [new priest] or other parish leaders. After leaving, I will not post to [parish's] social media sites.

In the coming weeks, we will have a chance to say goodbye to each other and to reflect on the ministry we have offered together in Christ's name in this place.

I know that you will offer [new priest] your support, your encouragement and your prayers as together you begin a new season of ministry. Please know of my prayers and gratitude for you and for the ministry we have shared.

Faithfully,

B. Practical Guidelines: Steps for the Departing Priest to Take (See more details in the Constitution and Canons of The Episcopal Church)

- Begin planning your departure early bearing in mind that the bishop has to concur with the plans first. Sufficient notice to the bishop is considered to be a minimum of four weeks when accepting another call, and four to six months if retiring, so that there is sufficient time for everyone to process feelings, to put parish business in good order and to prepare the wardens and vestry for their role in the transition. Timing of the announcement(s) is critical.
- Inform the bishop of your decision in person and seek the bishop's approval and then inform your regional canon and the wardens in person as well. With the wardens, notify the vestry.
- With the wardens, send two letters to the congregation:
 - One from you, expressing gratitude for your mutual ministry and your intent to end the ministerial relationship with the parish. It is helpful to include information about what your future plans are (see the template under section A.).
 - One from the wardens, setting forth the vestry's plan for leave-taking and the parish's future, expressing affirmation and hope.
- Notify, in writing, the bishop's office (including the date of your last service), community personnel and the Church Pension Fund (especially on retirement).

- Schedule and plan an exit interview with the bishop's office and one with the vestry and parish leaders. Find a time to fill out exit questions provided by the regional canon.
- Plan for a liturgical ending with the parish in the context of worship (see *Book of Occasional Services*).
- Plan to say a formal goodbye to shut-ins, staff and parish groups.
- Plan final visits with individuals with whom there may have been some tension or conflict.
- Issue an invitation to anyone who has "unfinished business" with you to come and talk.
- Plan ways of saying goodbye to those who have been particularly supportive.
- Change, in a timely manner the mailing addresses on all periodicals and correspondence addressed to you.
- Make sure to clean out your office by the time of the official "last Sunday," but do so gradually.
- Clean out personal files, including computer files. You may wish to leave files that would be helpful to the transitional priest in charge.
- Let the congregation know, in writing, that after your departure you will no longer do pastoral or priestly things with them (even in the transition period), such as leading a service or preaching at a wedding, baptism or funeral (see the template under section A). You will come back for a parish event only at the new rector's invitation, and then in the capacity as the former rector.
- Prepare a thank-you and/or farewell piece for the parish newsletter.
- To facilitate the transition in pastoral care, summarize in writing any pertinent information about the sick, shut-ins or others needing pastoral care (See exit questions in Appendix A).
- Within the context of preaching the Gospel, name your feelings and issues of closure in sermons. Do so in ways that allow you to share the experience of change and loss with the congregation, but don't lure the congregation into taking care of your feelings of sadness or ambivalence.
- If there is a gap between your departure and the arrival of the next clergy person to serve the parish during the transition, be sure the vestry has made arrangements for emergency pastoral coverage and notify the dean and area clergy. Be sure that lay leaders know about these arrangements.
- Have a party, in whatever style is most comfortable for you and the congregation!
- Turn in all keys, passwords, etc.

Liturgy for the Ending of a Pastoral Relationship (Template I)

Departing Minister:

On the [date] day of [month] [year] I was inducted as rector of [church name], [church town/city], Massachusetts. I have with God's help and to the best of my abilities exercised this trust, accepting its privileges and responsibilities.

After prayer and careful consideration, it now seems that I should leave this charge, and I publicly state that my tenure as rector of this parish ends this day. Mindful that the call to serve God is a call which comes in prayer, I now pray.

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

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

Bishop or Dean:

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

Departing Minister:

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

People: Amen

Departing Minister:

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

People: Amen

Departing Minister:

N. (Outreach Committee Chair) receive this (symbol of parish outreach project) that you may continue to (purpose of the outreach project)

People: Amen

Departing Minister:

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

People: Amen

Bishop or Dean:

Having witnessed the exchange of gifts between (Departing Minister) and those with whom the honor of ministry has been shared, do you, the people of (Church Name), recognize and accept the conclusion of this pastoral relationship?

People: We do.

Departing Minister and Congregation:

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

Silence

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

Silence

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

Silence

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

Silence

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

Silence

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

Liturgy for the Ending of a Pastoral Relationship (Template II)

Introduction to the Prayers of the People at the Leave-taking of a Priest

The occasion of leave-taking invites our prayer, and so it is appropriate that a rite of leavetaking be incorporated into the prayers of the people. This particular rite is adapted from the Solemn Collects, an ancient version of the prayers of the people. The Solemn Collects offer a spacious form that easily incorporates prayers specific to the departure of a priest. The prayers offered here frame the event of leave-taking as an occasion to renew our commitment to God's service. They draw primarily on the riches of *The Book of Common Prayer*; citations are included in the Sources section.

Members of the congregation may be appointed to lead the biddings; it is especially appropriate for wardens to lead some or all of the biddings. Silence is kept for a time after each bidding; the bishop or the bishop's representative then says the collect. After the biddings and collects, the departing priest addresses the congregation, and all say together the concluding prayer.

The Prayers of the People at the Leave-taking of a Priest

A Leader says

On this day of leave-taking, let us pray together for the Church, for the world and for the needs and concerns of this congregation.

Let us pray for the holy Church of God:

for its fidelity to the Gospel; for its
witness to God's love and mercy;
for all Christians, especially those whose faith is costly;
for N., our Presiding Bishop, and N. (N.), our Bishop(s), and for all bishops and
other ministers; for this congregation; for N. (and N.'s family), who now take
leave of this congregation.

Silence

Lord of the Church, you call us into your fellowship and send us into the world in witness to your love: Grant that those who leave and those who remain may be renewed for your service, that we might be salt, light and leaven in the world; through Jesus Christ our Lord, who came not to be served but to serve, and to give his life a ransom for many. *Amen.*

Let us pray for all nations and peoples of the earth, and for those in authority among them:

for our President, the Congress, and the Supreme Court; for all
who govern and hold authority in the nations of the world; for
this community, and for all who live and work in it;

for all who serve the common good; for those who must act swiftly and surely
for the well-being of their neighbors.

Silence

Eternal God, in whose perfect kingdom no sword is drawn but the sword of righteousness, no strength known but the strength of love: Kindle in every heart a love of peace and a longing for justice, and let those on whom authority rests be wise and gracious in its use, so that your will may truly be done on earth as it is in heaven; through Jesus Christ our Lord. *Amen.*

Let us pray for all who suffer in body, mind or spirit:

for all who are hungry or homeless; for all who are sick or
wounded; for all who face loneliness, doubt or despair; for all
who sorrow and all who grieve; for refugees, prisoners and all
who are in danger; for all in our congregation who are
suffering; for all whom we have served in this season of
ministry now past.

Silence

Lord Jesus, lover of souls, whose eye is on the sparrow: Tend the sick, give rest to the weary, bless the dying, soothe the suffering, pity the afflicted; and, as you sent out your disciples, send us out also in your Name to all who need your healing presence. *Amen.*

Let us pray for the departed:

for those who have died in the hope of the resurrection; for those whose faith
is known to you alone; for those who die alone; for those who will die today;
for the faithful of this parish who have died in this season of ministry now
past.

Silence

O God, whose days are without end, and whose mercies cannot be numbered: We commend to your gracious keeping all who have died, that they may go from strength to strength in your heavenly kingdom; and we pledge ourselves to your faithful service as we continue our course on earth; through Jesus Christ our Lord, who is the resurrection and the life. *Amen.*

The departing Priest then says to the congregation

By God's grace, I began my ministry as Rector of *(name of parish)* on *(date)*. It has been my privilege to love and serve you, sharing with you in the ministry of reconciliation to which God calls us at baptism. It is now time to relinquish my pastoral ministry in this place and for a new season of ministry to begin.

I commend you to the care of your new priest and to God's care and keeping. May God bless and guide you in the days to come, strengthen you in all goodness, comfort you in sorrow and give you the peace that passes understanding.

The departing Priest and the congregation then pray together

O God, you have bound us together for a time as priest and people, to share in the apostles' teaching and fellowship, in the breaking of bread, and in the prayers; to love and serve our neighbors in the name of your Son; to witness in word and deed to your tender mercies and saving power. Thank you, dear God, for all you have given us, and all that you have forgiven us, in this season of ministry. As we take leave of each other, grant that all of us, by drawing ever nearer to you, may always be close to each other in the communion of saints. All this we ask for the sake of Jesus Christ, your Son, our Lord. *Amen.*

Sources

The First Bidding

"for the holy Church of God": from Form V of the Prayers of the People in *The Book of Common Prayer*, page 389.

"For N., our Presiding Bishop, and N. (N.), our Bishop(s), and for all bishops and other ministers": from Form VI of The Prayers of the People in *The Book of Common Prayer*, page 392.

"send us into the world in witness to your love": from the Prayers for the Candidates in the service of Holy Baptism, in *The Book of Common Prayer*, page 306.

"that we might be salt, light, and leaven in the world": from Matthew 5.13, 14; 13.33.

"who came not to be served but to serve, and to give his life a ransom for many": from Mark 10.45.

The Second Bidding

"Let us pray for all nations and peoples of the earth, and for those in authority among them": from the Solemn Collects of the Good Friday Liturgy in *The Book of Common Prayer*, page 278.

"For our President, the Congress, and the Supreme Court": from the Solemn Collects of the Good Friday Liturgy in *The Book of Common Prayer*, page 278.

"For all who govern and hold authority in the nations of the world": from Form III of the Prayers of the People in *The Book of Common Prayer*, page 387.

"For all who serve the common good": from the Solemn Collects of the Good Friday Liturgy in *The Book of Common Prayer*, page 278.

"Eternal God, in whose perfect kingdom no sword is drawn but the sword of righteousness, no strength known but the strength of love": from No. 4, "For Peace," in Prayers and Thanksgivings in *The Book of Common Prayer*, page 815.

"Kindle in every heart a love of peace": from the Solemn Collects of the Good Friday Liturgy in *The Book of Common Prayer*, page 278.

“so that your will may truly be done on earth as it is in heaven”: from the Lord’s Prayer, in Matthew 6.10.

The Third Bidding

“for all who suffer in body, mind, or spirit”: from Form IV of the Prayers of the People in *The Book of Common Prayer*, page 389.

“For all who are hungry or homeless; for all who are sick or wounded; for all who face loneliness, doubt, or despair; for all who sorrow and all who grieve; for refugees, prisoners, and all who are in danger”: adapted from the Solemn Collects of the Good Friday Liturgy in *The Book of Common Prayer*, page 279.

“lover of souls”: from the Collect at the Prayers, No. 5, in *The Book of Common Prayer*, page 395.

“whose eye is on the sparrow”: from the gospel hymn “His Eye is on the Sparrow,” and from Matthew 6.26.

“Tend the sick, give rest to the weary, bless the dying, soothe the suffering, pity the afflicted”: from the concluding prayers in the service of Compline, in *The Book of Common Prayer*, page 134.

“as you sent out your disciples”: from Mark 6.7-13.

The Fourth Bidding

“For those who have died in the hope of the resurrection”: from Form I of the Prayers of the People in *The Book of Common Prayer*, page 384.

“For those whose faith is known to you alone”: from Form V of the Prayers of the People in *The Book of Common Prayer*, page 391.

“O God, whose days are without end, and whose mercies cannot be numbered”: from Additional Prayers in the Burial Office, Rite II, in *The Book of Common Prayer*, page 504.

“go from strength to strength in your heavenly kingdom”: from Additional Prayers in the Burial Office, Rite I, in *The Book of Common Prayer*, page 488.

“as we continue our course on earth”: from the Burial Office, Rite II, in *The Book of Common Prayer*, page 493.

“the resurrection and the life”: from John 11.25.

The Concluding Prayers

“May God bless and guide you...comfort you in sorrow, and give you the peace that passes understanding”: from No. 51, “For a Birthday,” in Prayers and Thanksgivings in *The Book of Common Prayer*, page 830.

“strengthen you in all goodness”: from the absolution after the Confession of Sin in Holy Eucharist, Rite II, in *The Book of Common Prayer*, page 360.

“O God, you have bound us together for a time as priest and people”: from A Service for the Ending of a Pastoral Relationship and Leave-taking from a Congregation in *The Book of Occasional Services* (1994), page 248.

“to share in the apostles’ teaching and fellowship, in the breaking of bread, and in the prayers”: from the Baptismal Covenant in the service of Holy Baptism, in *The Book of Common Prayer*, page. 304.

“grant that all of us, by drawing ever nearer to you, may always be close to each other in the communion of saints. All this we ask for the sake of Jesus Christ, your Son, our Lord.”: from A Service for the Ending of a Pastoral Relationship and Leave-taking from a Congregation in *The Book of Occasional Services* (1994), page 249.

APPENDIX D

Letter of Agreement for Bridge Priest and Congregation

Letter of Agreement

Between

[Church Name and Town/City] and The Rev. [Name of Bridge Priest]

Section A COMPENSATION

The bridge priest's salary will be [amount]. *[This will depend on the number of hours the priest is to work during the week plus Sunday services; a good way to determine the Total Clergy Compensation is to use the TCC worksheet found here*

<http://www.diomass.org/inside/docs/compensation-benefits-resources-congregations/> per annum commencing on [date] for [#] hours per week. This includes cash stipend, housing allowance and SECA, if applicable. This Letter of Agreement is valid through [date], but can be extended by mutual agreement of all parties. This Letter of Agreement may be terminated by either party upon a 30-day notice.

Section B PREMIUMS

1. The vestry will pay the following premiums as required:
 - (a) Pension premiums as required by the Church Pension Group based on the bridge priest's annual TCC.
 - (b) The cost of medical insurance premiums [specify whether individual or family coverage, which includes domestic partners, where applicable] according to the percentage prescribed by diocesan policy.
2. The vestry will provide the following additional benefits [specify other benefits, e.g., dental, other insurance, life insurance for clergy not eligible for pension, etc. and allocation of premiums].

Section C EXPENSES

The vestry agrees to pay for the following expenses incurred by the bridge priest in fulfilling professional duties.

The vestry agrees to reimburse the bridge priest for church-related travel at the current rate established by the IRS.

The use of the parish phone and all postage for church business will be included in the parish budget.

All necessary furniture and supplies will be paid by the parish.

Any honoraria for weddings, funerals and other special services are to be considered additional compensation for a bridge priest due to the short-term nature of this ministry.

A fund will be provided for charities and expenditures at the discretion of the bridge priest in accordance with the Diocesan Guidelines for Clergy Discretionary Funds.

The cost of pulpit supply and pastoral services when the bridge priest is absent from the parish will be paid by the parish.

Section D LEAVE TIME

Four weeks of vacation per year, accrued at one week per quarter. Additional time off for clergy retreat is strongly encouraged.

The bridge priest is expected and encouraged to participate in regional and diocesan meetings. These will include monthly meetings with diocesan staff, Diocesan Convention, deanery clericus and other meetings

Mutual Ministry and Responsibilities

The main responsibilities of the bridge priest are liturgy and pastoral care. The bridge priest is encouraged to meet with the wardens, the vestry and committees as time allows. Specific responsibilities can be drawn from the document Areas of Mutual Ministry Review found here: <https://www.diomass.org/file/32372>. You can also consult the Template of Letter of Agreement for Transitional Priests in Charge posted at <https://www.diomass.org/transitionministry-resources> for specific tasks and responsibilities.

Vestry Responsibilities

All ministries other than those reserved to the ordained leadership are reserved to the vestry. The vestry shall lead the laity in support of parish goals and deciding on the next steps in the life of the parish. The vestry is the legal agent for the parish in all matters concerning its corporate property. The vestry will offer support to the bridge priest, both personally and organizationally as well as its financial obligations. Again, specific responsibilities can be drawn from the document mentioned above: Areas of Mutual Ministry Review.

SIGNATURES

Date_____ Bridge Priest_____

Approved by the Vestry on: Date_____

Warden_____

Warden_____

Clerk_____

Reviewed by Regional Canon

Date_____ Regional Canon_____

Reviewed by the Bishop

Date_____ Bishop_____

APPENDIX E

The Transitional Priest in Charge in the Diocese of Massachusetts

The transitional priest in charge is trained to assist parishes during a time of transition, especially during the period between the leave-taking of one rector and the calling of another rector or settled priest-in-charge. It is an intentional ministry of sustaining the direction and ministry of a congregation as defined by the vestry; reviewing the past, assessing the present and evaluating the future. However, it is expected that the ministry during the transition period will be different from that experienced by members of the parish under the previous rector.

The major goal of the ministry of the transitional priest in charge is to prepare the congregation for the coming of the next rector. To this end, the transitional priest in charge shall:

- Help the congregation deal with a sense of loss and any unresolved issues arising from the rector's departure.
- Deal with internal conflicts and help heal any divisions within the congregation.
- Help the vestry, lay leaders and staff make such changes as may be needed to align parish life and administration with generally accepted standards in the diocese.

Selection of the Transitional Priest in Charge

- The bishop, through the regional canon, will choose an appointment from among qualified local candidates or recruit qualified external candidates for the position.
- The bishop will recommend one candidate at a time to the wardens and vestry.
- The candidate meets first with the wardens and then with the vestry. **The wardens and the vestry interview the candidate, do their due diligence and then give approval.**
- If the vestry and the candidate agree, a Letter of Agreement setting forth the mutual obligations and responsibilities of the transitional priest in charge and the vestry is negotiated under the facilitation of the regional canon. A standard transitional priest in charge Letter of Agreement is found as part of the diocesan clergy compensation guidelines available online at <https://www.diomass.org/transition-ministry-resources> . The appointment is official upon the establishment of the good match on both sides and becomes public knowledge upon approval of the Letter of Agreement by the bishop.

- If the proposed appointment of the transitional priest in charge is not felt to be a good fit by either the vestry or the clergy person, the bishop will draw upon that experience in order to identify another candidate for appointment.
- The presentation of a subsequent candidate is dependent upon the identification and availability of suitable candidates.

Note: Recognizing that the transition time is a period of intentional change and that a priest specifically trained in transition ministry is the best person to accompany a parish through this transition, it is not customary or desirable that a current assistant or associate become the transitional priest in charge.

Tasks of the Transition Period

The transition period is seen as a prime time for reviewing the parish and adjusting, if needed, its life and mission. Beyond maintaining effective ministry during this period, the vestry and transitional priest in charge are expected to work together to prepare for a healthy transition to the next rector. Recognizing that the review of a congregation's total ministry should be a continuing process, the transitional priest in charge, wardens and vestry are expected to meet at least monthly to clarify expectations and to evaluate successes and raise concerns from the congregation, staff, leadership or the transitional priest in charge in order to ensure the effectiveness of their joint ministry.

Focus Point During the Transition Period

- **Heritage:** Coming to terms with the history of the congregation and its relationships with previous clergy.
- **Mission:** Discovering the congregation's special identity and core values, what it dreams of being and doing apart from previous clergy leadership; short-term tactical plans can be worked out here.
- **Leadership:** Dealing with shifts in leadership roles that naturally evolve in times of transition, allowing new leaders to come to the fore constructively. New leaders might emerge, while seasoned ones may recommit or decide to refocus their gifts.
- **Connections:** Renewing and reworking relationships with the diocese and the community, so that each may be a more effective resource and support to the other. It is time to reassess old connections and to consider new ones.
- **Future:** Building commitment to the leadership of the new rector in order to be prepared to move into the future with openness to new possibilities.

Vestry Responsibilities

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

Responsibilities of the Transitional Priest in Charge

- The transitional priest in charge represents and extends the ministry which is the bishop's pastoral and canonical responsibility for congregations in leadership transition.
- The transitional priest in charge shall lead the parish as pastor, priest and teacher, sharing in the councils of this congregation and of the whole church, in communion with the bishop.
- The transitional priest in charge shall work with the vestry and other lay leaders to maintain the regular schedule of worship services and preaching, education, pastoral care and pastoral offices (weddings, funerals, baptisms), calling upon the sick and shut-in, visiting newcomers, and ongoing administration of the parish.
- The transitional priest in charge shall supervise all parish staff members in the exercise of their responsibilities and ministries, for which they shall be accountable to the transitional priest in charge.
- The transitional priest in charge supports the vestry in its responsibilities, including the hiring, evaluation and termination of staff.
- **The transitional priest in charge shall not under any circumstances be eligible to be a candidate for rector.**
- The bishop expects attendance at monthly meetings of the transitional priests in charge group.

APPENDIX F

Episcopal Diocese of Massachusetts

Letter of Agreement Between Transitional Priest in Charge and Congregation

This Letter of Agreement model contains recommended provisions that may be varied according to the particular facts and circumstances. For a part-time transitional priest in charge, the various sections should be prorated on the basis of a fraction (or percentage), e.g., half-time, three-quarters-time, etc. Consult the current Diocesan Guidelines for Compensation and Benefits.

Letter of Agreement BETWEEN

The Rev. [Name] and the Vestry of [Church Name and Town/City], Massachusetts, which has accepted [his/her/their] appointment by the bishop of Massachusetts to serve as the transitional priest in charge with the understanding that [he/she/they] will serve beginning [Date] and expect to terminate upon the arrival of the new rector or at a mutually agreed upon date with 30 days' written notice given by either the vestry or the transitional priest in charge, or at the discretion of the bishop diocesan and not requiring a 30-day notice. The parties agree that any changes in the terms and conditions of this agreement must first be approved by the bishop.

The relationship between a transitional priest in charge and a vestry is unique, and it evolves within a larger relationship of mutual trust and ministry with each other. The purpose of this letter is to strengthen that relationship by clarifying some of the practical arrangements and to reduce later misunderstandings.

Section A - Compensation

1. The salary of the transitional priest in charge will be \$[Amount] per annum commencing on or about [Date]. It will be adjusted annually according to the Total Clergy Compensation (TCC) guidelines.

The parties agree that the TCC for the transitional priest in charge will equal \$[Amount] (including the amount of the housing allowance, if applicable) which corresponds to [Amount] percent of full-time based on current Diocesan Guidelines for Compensation and Benefits.⁹

2. Housing ¹⁰

Option A – Transitional priest in charge will not live in a rectory

⁹ Specify other compensation received by the transitional priest in charge that may be considered part of TCC. Consult the current Diocesan Guidelines for Compensation and Benefits.

¹⁰ The model contains two options relative to housing. Option A applies to those situations where the transitional priest in charge will not live in a rectory. Option B applies to those situations where the transitional priest in charge will live in a church-provided rectory.

The vestry agrees to adopt annually the necessary resolution required by the Internal Revenue Service designating that portion of the TCC shown above as a housing allowance within the meaning of Section 1.107 of the IRS Code.¹¹

Option B – Transitional priest in charge will be living in the rectory

The transitional priest in charge [and family] will be living in the church-owned rectory. The vestry will be responsible for the following expenses:

- (a) Insurance (and property taxes, if any) on the property.
- (b) Maintenance or replacement of some appliances: [Specify such appliances];
- (c) Maintenance of the structure(s), renovations or capital improvements;
- (d) [Specify other responsibilities, e.g., snow and leaf removal, etc.].

The transitional priest in charge [and family] are responsible for good stewardship in regard to the care of the rectory and will remain responsible for the general care and upkeep such as [specify particular responsibilities].¹²

The transitional priest in charge is expected to present an annual report to the vestry on the condition of the rectory, with particular attention to items requiring maintenance.

The vestry agrees to adopt annually the necessary resolution required by the Internal Revenue Service designating that portion of the TCC shown above as a housing allowance within the meaning of Section 1.107 of the IRS Code.

3. [Optional] Other Compensation: [Specify, e.g., SECA allowance, equity allowance, 403(b) contribution, etc.].¹³

Section B - Premiums

1. The vestry will pay the following premiums as required:

¹¹ The amount of the TCC designated as a housing allowance should be the lesser of (1) the fair rental value for the housing: including furnishings and appurtenances (such as garage) and utilities or (2) the amount the transitional Priest in Charge expects to spend on housing.

¹² The specific responsibilities of the vestry and transitional Priest in Charge will depend on the particular facts and circumstances. Once these are determined, they should be delineated with as much specificity as possible.

¹³ Since the transitional Priest in Charge while living in a church-provided rectory will not build any equity in a home, a number of vestries have agreed to fund an equity allowance through contributions to a tax sheltered 403(b) plan. Such other compensation is includable as TCC.

(a) Pension premiums as required by the Church Pension Group based on the TCC of the transitional priest in charge or will establish and contribute to an IRA-based plan for providing retirement benefits to the transitional priest in charge who is not eligible to participate in both the clergy pension plan and the defined contribution 403(b) plan (please consult the Diocesan Guidelines for Compensation and Benefits and the U.S. Tax Guide). When necessary, the Church Pension Group provides all active and qualified clergy with a short-term disability benefit.

(b) The cost of medical insurance premiums [specify whether individual or family coverage, which includes domestic partners, where applicable] according to the percentage prescribed by diocesan policy. In addition, because there is often a lapse of time between transition positions, it is recommended that the parish continue to pay health insurance for the transitional priest in charge for a period of up to 90 days, if needed, following completion of the assignment of the transitional priest in charge in that parish.

2. The vestry will provide the following additional benefits [specify other benefits, e.g., dental, other insurance such as long-term disability insurance, life insurance for clergy not eligible for pension, etc. and allocation of premiums].

3. In the event of a total and permanent disability of the transitional priest in charge, or in the case of the death of the transitional priest in charge, the following agreements apply:

(a) Regarding housing: _____ month(s) in rectory OR _____ month(s) housing allowance.

(b) Regarding compensation (in the event of permanent disability): _____ month(s) salary per year of service, up to a maximum of _____ month(s).

Section C - EXPENSES

The vestry agrees to pay for the following expenses incurred by the transitional priest in charge in fulfilling their professional duties:

1) Moving expenses: The cost of moving the transitional priest in charge [and family] and household goods when the appointment has been accepted.

2) Travel: The vestry agrees to provide the transitional priest in charge with _____
[Option A: reimbursement for all church-related automobile travel at the current rate established by the IRS.]

[Option B: a travel allowance of \$_____ per year adjusted annually and included in the annual budget for all church-related automobile travel.]

[Option C: an automobile for purposes of church-related travel upon such terms as the vestry and the transitional priest in charge shall determine.]

- 3) Communications: To provide for a computer/laptop/tablet, internet connection and a phone in the transitional priest in charge's office and a cell phone if necessary. All postage for church business will be included in the parish budget.
- 4) Office: All necessary office furniture, equipment and supplies will be paid by the parish, the amount to be established in the annual budget.
- 5) Discretionary Fund: A fund will be provided for charities and expenditures at the discretion of the transitional priest in charge in accordance with the Diocesan Guidelines for Clergy Discretionary Funds, the amount to be established in the annual budget.
- 6) Guests and Hospitality: The transitional priest in charge will be reimbursed for the reasonable costs of hospitality and entertainment on behalf of the parish, the amount to be established in the annual budget.
- 7) Professional Fees: Dues of the transitional priest in charge to professional associations, the cost of the annual Clergy Conference with the bishops and the cost of professional periodicals, the amount to be established in the annual budget.
- 8) Continuing Education: The amount of \$ _____ annually to support continuing education with the expectation that there be a report to the vestry on continuing education work.
- 9) The vestry agrees to pay the cost of supply clergy and pastoral services when the transitional priest in charge is absent from the parish, the amount to be established in the annual budget.

Section D - LEAVE TIME

[Currently, four weeks of vacation per year and one week of continuing education/career development per year are the recommended minimum. Additional time off for clergy retreat is strongly encouraged.

For employment periods longer than eight months but less than one year, the normal vacation leave for clergy of four weeks per year (including Sundays) may be prorated].

1. _____ weeks of vacation per six months, including Sundays
2. _____ weeks per year (in addition to vacation time) for continuing education and career development [and _____ days per year (in addition to the above) for time of retreat].
3. [Specify other leaves.]
 - a) The transitional priest in charge shall also have some negotiated additional time off after Christmas and Easter.
 - b) Plans for personal and sick days (please specify as agreed upon with the vestry).

- c) Plans for public holidays (please specify as agreed upon with the vestry).
- d) Plans for parental leave in the event of childbirth, adoption or foster care. Please consult current Diocesan Guidelines for Compensations and Benefits.
- e) Other

Section E - SUPPLEMENTARY COMPENSATION

The disposition of wedding, funeral and other church-related fees will be determined in conjunction with the vestry and may be used to fund the discretionary fund.

The following understanding has been reached between the transitional priest in charge and the vestry concerning the income the transitional priest in charge may receive performing [specify].

Section F - USE OF BUILDINGS

The vestry shall make the decision for use of the church and buildings by outside individuals or groups in consultation with the transitional priest in charge.

Section G - MUTUAL MINISTRY AND RESPONSIBILITIES

Recognizing that the review of a congregation's total ministry should be a continuing process, a meeting between the transitional priest in charge and the wardens is required at least twice a month with encouragement to meet more often in periods and under circumstances where extra meetings would be helpful.

The transitional priest in charge, wardens and vestry agree to meet monthly (regular vestry meeting) to clarify expectations and to evaluate successes and raise concerns from the congregation, staff, leadership or the transitional priest in charge in order to ensure the effectiveness of their joint ministry.

Focus Point During the Transition Period

The transition period is seen as a prime time for renewal, re-energizing the parish in its life and mission. Beyond maintaining effective ministry during this period, the vestry and the transitional priest in charge shall work together to prepare for healthy transition to the next rectorship.

Specific tasks to be addressed include:

- 1) Heritage: Coming to terms with the history of the congregation and its relationships with previous clergy.
- 2) Mission: Discovering the congregation's special identity and core values, what it dreams of being and doing apart from previous clergy leadership; short-term tactical plans can be worked out here.

- 3) Leadership: Dealing with shifts in leadership roles that naturally evolve in times of transition, allowing new leaders to come to the fore constructively. New leaders might emerge, while seasoned ones may recommit or decide to refocus their gifts.
- 4) Connections: Renewing and reworking relationships with the diocese and the community, so that each may be a more effective resource and support to the other. It is a time to reassess old connections and to consider new ones.
- 5) Future: Building commitment to the leadership of the new rector in order to be prepared to move into the future with openness to new possibilities.

Vestry Responsibilities

All ministries other than those reserved to ordained leadership (such as administering the sacraments) are understood as mutual ministries of the laity of the parish and the transitional priest in charge. The vestry shall lead the laity to support and cooperate with the transitional priest in charge in pursuit of parish goals and in the performance of the focus point during the transition period.

The vestry is legal agent for the parish in all matters concerning its corporate property and in its relationship with the transitional priest in charge. The vestry will see that the transitional priest in charge is properly supported, personally and organizationally, as well as in the vestry's financial obligations to the transitional priest in charge.

Responsibilities of the Transitional Priest in Charge

The transitional priest in charge represents and extends the ministry which is the bishop's pastoral and canonical responsibility for congregations in leadership transition. The transitional priest in charge shall lead the parish as pastor, priest and teacher, sharing in the councils of this congregation and of the whole church, in communion with the bishop.

The transitional priest in charge is trained to assist parishes during a time of transition, especially during the period between the leave-taking of one rector and the calling of another rector. It is an intentional ministry of sustaining the direction and ministry of a congregation as defined by the vestry; reviewing the past, assessing the present and evaluating the future. However, it is expected that the ministry during the transition period will be different from that experienced by members of the parish under the previous rector.

The major goal of the transitional priest in charge's ministry is to prepare the congregation for the next phase of its life.

To this end, the transitional priest in charge shall:

- help the congregation deal with a sense of loss and any unresolved issues arising from the departure of previous clergy;
- deal with internal conflicts, if any, and help heal any divisions within the congregation;

- help the vestry, lay leaders and staff make such changes as may be needed to align parish life and administration with generally accepted standards in the diocese.

The primary tasks of the transitional priest in charge shall be to:

- work with the vestry and other lay leaders to maintain the regular schedule of worship services and preaching, education, pastoral care and pastoral offices (weddings, funerals, baptisms);
- call upon the sick and shut-in, visit newcomers, and ongoing administration of the parish;
- supervise all parish staff in the exercise of their responsibilities and ministries, for which they shall be accountable to the transitional priest in charge. If it is necessary in the transition time to hire or terminate staff, the wardens shall take those actions, given their canonical responsibility for the parish between rectors.
- support the vestry in its responsibilities.

The transitional priest in charge is expected and encouraged to participate in regional, diocesan and churchwide responsibilities as well as community endeavors. Further, time given to such work shall be understood as an integral part of the ministry of the transitional priest in charge in the parish.

Monthly attendance at meetings of the transitional priests in charge and search consultants is expected by the bishop.

The transitional priest in charge shall not be eligible to be a candidate for rector.

Section H – STATEMENT OF NON-DISCRIMINATION

In accordance with diocesan and Episcopal Church principles, this congregation will not discriminate on grounds of age, race, gender, sexual orientation, marital status or disability.

PARISH SIGNATURES

Date: _____ Transitional Priest in Charge: _____

Approved by the Vestry on: _____ Date _____

Warden _____

Warden _____

Clerk _____

Reviewed by Regional Canon

Date_____ Regional Canon_____

Reviewed by the Bishop

Date_____ Bishop_____

APPENDIX G Responsibilities of Transition Team

The transition team, created by the vestry at the time of the announcement of a rector's upcoming departure, particularly when there may be a longer-than-average period of time between announcement and departure, serves primarily to oversee the overall health of the clergy and parish in the interest of a life-giving and positive transition time. The transition team should be made up of about six to eight members and meet as needed, with greater time and attention focused during the time of leave-taking and again for the welcoming of the new rector. The expectation is that they themselves may not do all of these tasks, but will find people to take on various responsibilities.

Their specific tasks might include:

- Provide support for whatever clergy may be present. This means the departing rector, the transitional priest in charge, assisting clergy, the new rector and their families.
- Coordinate celebrations and thanksgivings for the ministry of the departing rector, including the final service.
- Prepare ways of welcoming and orienting the new rector and family to both the parish and the community, including social events, small gatherings in people's homes, showing the new rector where the stores, schools and medical services may be found, etc.
- Undertake other transition-related tasks from time to time as may seem appropriate.

APPENDIX H

Parish Discernment Resources

Some Reflections, Questions and Resources for Ministry with Parishes in Transition

Introduction

Ministry with parishes in transition is a privilege, full of surprises, blessings and challenges. It also provides an opportunity for people to reflect on some fundamental questions that may not be asked when life is more settled. It is a chance to keep asking why, to help people uncover the deeper answer under the initial response.

The questions that follow, sorted into five categories, are not meant to be exhaustive, but rather a helpful point of departure for those engaged in ministry with parishes in transition. For each set of questions, suggested resources are offered. The idea is to engage people in sustained conversation and reflection about these matters.

Ideally, the questions in this document are best explored *before* the start of a rector search process, so that parishioners have ample opportunity to reflect on their parish, its past, present and future, and their minister –how God is calling them to live the Gospel in this particular place and time. Such a process should also give search committee members greater clarity about how a new rector can best join the congregation in ministry.

How these materials can be used

The following material can be used in a variety of ways. Some questions may be more relevant to a particular parish than others. Some resources can be used over several weeks or months, others lend themselves to a quiet day or workshop. So much depends on the culture and circumstances of the parish and how receptive people are to engaging questions of identity and purpose.

This material is meant to be used by those facilitating exploration of the questions that follow. Participants in gatherings would receive in advance the specific questions to be considered and an outline or schedule for a particular gathering. It would be helpful, at the start of each gathering, to ask, “What questions do you have?” In this way, people have the chance to clarify something discussed at a previous meeting or to refine a question so that it better suits the circumstances of the parish.

It’s important to keep in mind that people’s answers to these questions will evolve over time. For example, the spiritual landscape of a church soon after the departure of a longtime rector will be different from the landscape several months into the transition time.

There are several ways that this material could be presented:

- The material in this document could be the basis for a retreat for the vestry and search committee that is open to all parishioners as well.
- The search consultant could lead the search committee in reflecting on one of the five sections, and the transitional priest in charge could lead the vestry in considering the same section, so that both groups encounter the same material at roughly the same time.
- Some of the questions could be used as the basis for a parishwide conversation.

However this material is used, it is essential that those facilitating the material offer it as an invitation to reflection rather than as a task to be checked off on the way to calling a new rector.

Prayer

“Likewise the Spirit helps us in our weakness; for we do not know how to pray as we ought, but that very Spirit intercedes with sighs too deep for words. And God, who searches the heart, knows what is the mind of the Spirit, because the Spirit intercedes for the saints according to the will of God.” (Romans 8:26-27)

The ministry of prayer is essential to the entire parish. This is an opportunity to help people deepen their prayer by introducing different ways to pray and develop spiritual practices. It is also a time to encourage parishioners to lay a foundation of prayer for the new rector.

- What is the place of prayer in your life and in the life of the congregation? How might it be deepened?
- What are you anxious about in this transition time? How can you pray about it?
- What are your hopes and dreams in this transition time? How can you pray about them?
- How might God be speaking to us individually and as a parish through Scripture?
- What gifts might God give us if we surrendered our anxiety about finding the right rector and claimed the truth that God is the center of our parish?

Resources

- *You Are Already Praying* (Cathy George)
- Richard Rohr’s works and his Center for Action and Contemplation (<https://cac.org>)
- SSJE and Bethany House of Prayer
- Daily Office online – www.missionstclare.com
- *The Story: Read the Bible as One Seamless Story from Beginning to End* (Zondervan; Ben Irwin, ed.) – a 400-page abridgement of the Bible, divided into 31 chapters
- The Bible Challenge (www.thecenterforbiblicalstudies.org)

Church

“Will you continue in the apostles’ teaching and fellowship, in the breaking of bread, and in the prayers?” (from the Baptismal Covenant in *The Book of Common Prayer*, p. 304)

Before focusing on the gifts, challenges and needs of a particular parish, it would be fruitful to explore what a church is. The transition time is also perfect for a solid review of the polity and worship of The Episcopal Church, especially as many parishioners were raised in different traditions.

- What does it mean to be a church?
- What can we learn about the church from the Bible?
- What does it mean to be the church today, when religion is now a choice rather the expected thing to do?
- What are the unique gifts of The Episcopal Church? How is it organized for ministry?
- How are we bigger than our parish?
- What does it mean to move from another denomination to The Episcopal Church?

Resources

- Welcome to The Episcopal Church Series (Christopher Webber, Vicki Black, Peter Wenner)
 - *Welcome to The Episcopal Church* ◦ *Welcome to Sunday* ◦ *Welcome to the Bible*
 - *Welcome to the Book of Common Prayer* ◦ *Welcome to the Church Year* ◦ *Welcome to Anglican Spiritual Traditions* ◦ *Welcome to the Christian Faith*
- *The Episcopal Way (Church's Teachings for a Changing World: Volume 1)* (Eric Law and Stephanie Spellers)
- *A People Called Episcopalians: A Brief Introduction to Our Peculiar Way of Life* (John Westerhoff)
- *People of the Way: Renewing Episcopal Identity* (Dwight Zscheile)

Ministry

“Now there are varieties of gifts, but the same Spirit; and there are varieties of services, but the same Lord; and there are varieties of activities, but it is the same God who activates all of them in everyone.” (1 Corinthians 12:4-6)

Some parishioners may assume that ministry is something that only clergy do. Some may also have very little idea of what the rector does, and yet assume that the rector is responsible for inspiring parishioners and attracting people to the congregation. A time of transition, then, is ripe for engaging parishioners in reflecting on what it means to be a member of the body of Christ. As the call to ministry is rooted in baptism, not in ordination, a transition provides an opportunity to explore the “varieties of gifts and services” that the Spirit has given parishioners. It is also essential to deal with the projections and expectations that clergy often bear and to offer a realistic understanding of what parish priests do.

- What does it mean to be a Christian?
- What are the responsibilities of every Christian?
- What responsibilities do Christians have to their parish?
- What is ministry?
- What does a rector do?
- What expectations do you have for a new rector?
- What are *reasonable* expectations for a rector?
- Do you want your rector to challenge you? To comfort you? To teach you? Is there one that is most important for you?

- Are you calling a rector primarily to help you maintain an institution? To equip you for ministry? To help move the parish forward? All of these?

Resources

- “Areas of Parish Mutual Ministry” (www.diomass.org)– sorts through what work must be done by a priest and what can be done by parishioners
- An Outline of the Faith: The Ministry (p. 855 ff.) in *The Book of Common Prayer*
- Canons of The Episcopal Church

Parish

“But speaking the truth in love, we must grow up in every way into him who is the head, into Christ, from whom the whole body, joined and knit together by every ligament with which it is equipped, as each part is working properly, promotes the body’s growth in building itself up in love.” (Ephesians 4:15-16)

Taking time to delve deeply into the unfolding history of the parish – where it’s been, where it is now, where it wants to go – will lend clarity to the formal discernment process. Letting the past, present and future come into focus will help ensure a “truer” parish profile and provide a solid basis for talking with rector candidates.

- What story do you tell about your parish? What is the narrative of your parish?
- What are the major milestones and events in your parish’s history? What do they mean? How has God used them?
- Is there anything in your history as a parish that especially helps your progress on the journey? How could you use this strength intentionally during this time of transition?
- Is there anything in your history as a parish that might hinder your progress on the journey? If so, how do you wish things had been different? What do you need to move forward?
- Imagine your parish five years, 10 years, even 25 years from now. What do you hope to be doing by way of worship, outreach, education, etc.? What resources do you need to make this vision a reality? What might you need to let go of?
- Is your parish’s current approach to ministry sustainable? How could you increase the sustainability and vitality of your parish?
- Are there issues in the “psychology” of the parish that are influencing behavior in the parish and the direction the parish is taking?
- Do you see new leadership emerging in the parish? Are there areas of the parish that are ripe for new leadership?
- Are there unhealthy patterns of communication in your parish? If so, what is needed in order to resolve them?
- What has been your experience of transition?
- What is the joy and the passion of your parish?

Resources

- Appreciative Inquiry / Clergy Leadership Institute (www.clergyleadership.com)
- Congregational Development: Resources for Parish Viability and Vitality (www.congregationaldevelopment.com)
- Alban Institute resources (<http://alban.org>)

Discernment

“And when you turn to the right or when you turn to the left, your ears shall hear a word behind you, saying, ‘This is the way; walk in it.’” (Isaiah 30:21)

This is a time to help people think about and practice discernment before the formal discernment process begins. The work that people do in the preceding areas – Prayer, Church, Ministry, Parish – will also provide some common ground for discernment.

- How do we know the difference between God’s will and our will?
- If discernment is seeing as God sees, how is God inviting us to see in a new way?
- Where is God moving right now in our parish?

Resources

- *Discerning God’s Will Together: A Spiritual Practice for the Church* (Danny E. Morris & Charles M. Olsen)
- *Listening Hearts: Discerning Call in Community* (Suzanne Farnham, Joseph Gill, R. Taylor McLean, Susan Ward)
- *A Hidden Wholeness: The Journey Toward an Undivided Life* (Parker Palmer)
- SSJE and Bethany House of Prayer

APPENDIX I

Rector Search Consultant Role and Agreement

The Episcopal Diocese of Massachusetts Rector Search Consultant Role and Agreement

The search consultant is engaged by the parish vestry but is assigned by and accountable to the bishop’s office through the regional canon for the search process. The consultant meets with members of the vestry at the beginning of the search process, explaining the consultant’s role in the process. Thereafter the consultant works primarily with the search committee members and guides them through the search.

Specifically, the consultant works with the search committee to help plan and design protocols for the search. The consultant helps review and comments on the parish profile and OTM community portfolio; helps compile and interpret data and put together the TMC Open Position Form. The consultant helps develop interview questions and a design for the interview process.

The search consultant serves as the search committee's principal link with the regional canon. Often the transitional priest in charge plays a significant advisory role in the process. The regional canons strongly recommend that communication be as open as discretion allows throughout the search process, with frequent updates to all participants and the congregation. E-mails among the search consultant, search committee, transitional priest in charge and regional canon should be generously cc'ed. This practice will make for fewer surprises and a smoother transition.

The parish is responsible for the fees paid to the consultant and must make an arrangement with the consultant for regular payment. If the cost of the consultant will place an undue burden on the congregation, the wardens are encouraged to contact the bishop's office, through the regional canon. The search consultant's fee is negotiated with the vestry; the fee is on a sliding scale based on the parish budget. The scale is:

Parish Budget	\$50,000-\$100,000	Consultant fee	\$500
	\$101,000-\$500,000		\$1,500
	Over \$500,000		\$2,000-\$2,500

The consultant is also paid travel reimbursement at the IRS mileage rate.

Parish _____ City _____

Warden Name _____

Warden Signature _____

Date ____/____/____

Consultant Name _____

Consultant Signature _____

Date ____/____/____

APPENDIX J

Search Committee Job Description

Formation of the Search Committee

The search committee is a creation of the vestry and works for and on behalf of the vestry. The committee should be formed shortly after the previous clergy leaves the parish. The entire vestry appoints members to the search committee. It is important to keep in mind that in accordance with the canons of the church, only the vestry can elect the rector (unless otherwise provided in the parish bylaws) and the wardens issue a call and then only with the approval of the bishop. However, the parish bylaws should be consulted before the charge is given to the search committee for process conformity purposes.

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. It should be made clear to the congregation that, though volunteers for the committee are given careful consideration, because balance of the committee is so crucial to the search process, volunteers may or may not be appointed. **It is not appropriate for staff or other clergy to serve on the search committee.**

The chair of the search committee may be designated by the vestry or elected by the committee itself. As a rule, wardens should not serve on the search committee since all their energies should be devoted to their unique and heightened responsibilities during the transition period. They may attend meetings as non-voting members, if they so choose. A search committee normally is somewhere between eight and twelve persons, although smaller parishes may have smaller committees. At least one vestry member (often two) whose term will extend through the transition time should be appointed to serve on the search committee in order to act as liaison and information link between the two bodies.

Desired Characteristics of Search Committee Members

In the body of Christ, no one member possesses all the gifts: rather we need one another. Likewise, no individual search committee member will have all the desired characteristics, but together with others can discern the will of God for the community. Here are some desirable characteristics for all search committee members:

- Good organizational skills (essential for the chair of the committee)
- Team player
- Person of prayer
- Member in good standing (attends church regularly, giver of record, gives of time and talent)
 - Willing to work for the good of the church and not partisanship
- No hidden agendas
- Can maintain confidentiality

Note: The conducting of a search for new clergy differs in many ways from the traditional executive corporate search. Therefore, it is not desirable for the search committee to adopt a corporate search model during its discernment and deliberations. By the same token, vestries should resist the temptation to stack the committee with persons having human resources or executive search backgrounds.

Job Description for the Search Committee

The job description for this committee is detailed in the Sample Charge from the Vestry to the Search Committee, See Appendix K.

Sample Charge from the Vestry to the Search Committee

The following letter of understanding between the vestry and search committee communicates the objectives and responsibilities of the search committee in the filling of the rector position at [Church Name] in [Town/City], Massachusetts.

The vestry and wardens are the formal leadership of the parish in the absence of a rector. It is their responsibility to:

- Work with the congregational business consultant to perform the transition review
- Secure the services of clergy during the transition time
- Engage a search consultant as recommended by the regional canon to assist in the search process
- Appoint and charge a search committee
- Provide both a scope and a budget for the search
- Maintain the congregation while the search is being conducted
- Develop a salary and housing package for the new rector
- Ultimately, elect and call a new rector
- Negotiate the package and covenant of ministry with the new rector

The vestry requests that the search committee assume the following responsibilities on behalf of the vestry:

- Elect search committee leadership, including a chair and vice-chair (or co-chairs), recording secretary, corresponding secretary and a chaplain
- Work with the search consultant contracted by the vestry
- Determine and employ appropriate group dynamics exercises in order to build a sense of community and common purpose, strengthen knowledge of each other and develop strong communication levels
- Establish, and revise periodically as necessary, a projected timetable for fulfillment of the search committee's responsibilities
- Determine the format for and conduct a self-study of the congregation
- Develop a parish profile which briefly describes the parish – its passions, hopes and dreams for the future, and gifts for ministry desired in a new rector.
- Complete the community portfolios and forward them to the regional canon to be uploaded on the OTM website and the Transition Ministry Conference newsletter.
- Develop and implement a process for screening candidates including written questions, reference checks, phone interviews, visits and interviews with final candidates
- Develop a uniform system of rating and ranking candidates
- Communicate the progress of the search committee regularly to the parish through announcements, bulletins and newsletters
- Communicate with candidates promptly their status in the process
- Recommend one final candidate to the vestry for election and call*

* The procedure for electing a new rector may vary from parish to parish. The parish bylaws should be consulted during the process of creating the letter of understanding/charge.

APPENDIX L Sample Liturgy for Commissioning Search Committee

The congregation, being seated, the celebrant stands in full view of the people. The wardens and candidates stand facing the celebrant.

Warden: I present to you these persons to be admitted to the ministry of the Search Committee.

The Celebrant says the following words:

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

The Celebrant asks the warden:

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

Warden: I believe they are.

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

Candidates: I will.

Celebrant: Let us pray.

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

In the Name of God and of this congregation I commission you as members of the Search Committee of [Church Name].

APPENDIX M Search Options

In the absence of the rector, the wardens and vestry are the formal and canonical leadership of the congregation during the transition period; as such, they hold the responsibility of choosing a course of action best suited to their particular parish and situation. After the rector has announced departure, the regional canon explores the various search

options and shares with the vestry (and congregation, if necessary) an overview of the search process as well. Then the vestry determines an appropriate search option to take. The following are available search options:

1. Full Search

2. Short List Search

3. Appointment of a Priest-in-Charge

All of these options are described elsewhere in this document.

Search Process Timeline

Self-Study (Retreat to develop the process and materials and writing of the parish profile):
Six to nine months, on average

Receiving Names: Four to eight weeks

**Reading Applications; Narrowing the Field; Choosing Long List; Deployment
Check:** One to two months

Phone Interviews; Choosing Short List: One and one-half to three months

Interviews and Final Selection: Two to three months

Time between call and arrival of new rector: Two to three months

Total Time: 13– 22 months

Each parish moves at its own pace and according to its own process of discernment; this timetable is suggested only as an aid in gauging progress and holding to a schedule.

Sample Budget for Search Process

The regional canons recommend that parishes set aside some money years in advance for new rector call so there is not so much of a drain on the budget during the search year.

Search Consultant: See scale in Appendix I

Phone and conferencing fees: \$200

Oxford Document background checks: \$165 per person

Visits to candidates: \$ 500 - \$?*

Final candidates' visits to parish: \$ 200 – \$2,500*

Moving expenses of new rector: \$3,000 – \$25,000 *

Celebration of new ministry + transition dinners/parties: ±\$ 500

* These figures are estimates only and vary greatly depending on the size of the parish and how wide the search is extended geographically in the final stages. A total search budget might range from \$5,000 to \$50,000 or more.

Parish Profile Outline

Every parish story is different; hence every profile will reflect those differences and have its unique style. Some churches find carrying a theme throughout helps them to focus their story, but this is not necessary. The search committee should decide the right format of the profile (a brief: a brief one to two-page profile or the traditional multipage booklet) that will help them to meet the needs and expectations detailed in their job description. Additional background materials may be placed on the parish website. The essential parts of any profile should include:

- ☐ Introduction: **Who we are**, including a brief history of the parish.
- ☐ **Where we are located**: A brief geographical and demographic overview of the community in which the church is located.

- ☐ **Our mission & ministry:** An overview of the church's mission goals, visions and dreams. More detailed information about the buildings and property, including photographs, can be put on the website.
- ☐ A statement about the **diocesan mission strategy**, which can be found on the diocesan website at <https://www.diomass.org/our-mission/mission-strategy-process>
- ☐ A statement of **financial information** about the parish.
- ☐ Finally, a statement about the kind of person the parish is searching for to be a companion in the congregation's journey toward fulfilling its mission and vision, including leadership style, clergy gifts for ministry sought by the parish and other expectations and challenges for the new rector.

Profiles of parishes that are ready to receive names are posted to the diocesan website on the first Wednesday of the month.

When the search committee has a final draft of the profile, it should submit it and the Office of Transition Ministry Community Profile form (OTM) and the Transition Ministry Conference (TMC) job posting information form to the regional canon for review. This timing will make it possible for all to be coordinated for posting on the first Wednesday of the month. The parish should post the profile to its own website on that same day.

Q

Interviews, Interviewing and Various Sample Questions

The most important aspect of the interview process is to be clear about what one hopes to learn in asking a question. In the first stage, the written questions may be used to cull the initial list down to something more manageable; the aim is to get an accurate and comprehensive snapshot of the person. During a phone or video conference interview, the aim is greater depth into who the person is and the suitability of that person as a match for the parish.

Finally, when interviewing the finalists face to face, the questions need to be evidence-based, asking for specific examples. In other words, what has the person done in the various areas that are important to the parish? The best indicator of what a person will do is what that person has done. In any interview, avoid asking questions that can be answered by a single word, generally "yes" or "no." Rather, use open-ended questions that ask for specific examples of past job behavior. Try not to give the person the answer you are asking for in the context of the question. In other words, if you are a parish with a strong youth component, don't say, "We have a lot of young people in our parish and are seeking someone to build our youth programs. Tell us, how do you feel about young people?" Instead, try to have them tell you what you want to know without telling them what you want.

APPENDIX

After asking a question, take the time to listen. The longer one listens, the more evidence one is able to gather. Let the candidates talk first. Taking time to share concerns and issues in the parish comes only after the candidates have had the opportunity to talk about themselves, their ministry, hopes and dreams.

Some sample questions follow. The search committee, in consultation with the search consultant, will no doubt come up with questions that are appropriate to the particular parish; these are offered to provide a place to start in the thinking process.

Sample Written Questions (Use no more than four or five.)

- In the past five years of your ministry, what is the accomplishment of which you are most proud?
- What drew you to the priesthood?
- What do you see as your role in church growth and stewardship?
- What leads you to consider a new position at this time?
- How do you continue to peel back the layers of discovery and Christian growth in the midst of your work right now?
- How do you bring your own brokenness into your ministry?
- Include at least one question based on past performance relevant to the needs of the particular parish, i.e., Please tell us about a time when.....

Sample Questions for Phone Interviews

- Please comment on our profile. Do you see something missing that is important in your ministry? Is there something present that would be a challenge to you?
- What do you do for fun? Or, what book is by the side of your bed right now?
- What has brought you the greatest joy in your ministry? What do you enjoy the least?
- Describe a situation in which theological difference led to conflict in your parish. What did you do to handle the situation?
- When you first came to your present parish, if you knew then what you know now, what would you have done differently?
- Please comment on our diocesan mission strategy.
- How do you handle the balance between vocation and home life?
- Describe your prayer life/spiritual discipline.
- Describe your sermons. How do you prepare them, what kinds of topics do you address, what is the place of the Bible, current events, your own experiences?
- How would you describe your leadership style, with staff, vestry, parishioners, the community?
- Tell us about your involvement in community and diocesan activities.

Sample Questions for Finalists

- (This is the most important question of all and should be asked of all final candidates!) Tell me about a time in your ministry when you felt most alive, most energized, most excited. What was this time, who was involved and why does this particular incident stand out?
- Tell us about a time when things weren't going well.
- In the past three years has your parish reached its stewardship goals, and if not, why not? What is your theology of stewardship and how do you see your role?
- What would you like to tell us about yourself that will help us know you better? What can we tell you about us?
- One of the particular areas for growth at _____ is _____. Tell us how you have addressed this in other parishes in which you have served.

- Having come this far on your journey with us, what excites you about coming here? What do you think you could bring us?
- How have you demonstrated a commitment to diversity in leadership?
- It has been said there are two distinct styles of ministry leadership: ministry developer and ministry deliverer. Which would you say is your style of leadership and what evidence can you offer to support this?

Best Practices for Finalists' Visits to Parish

- ☐ Do remember that this time is a two-way interview. The candidate (and family) is as interested in finding out about you as you are about them.
- ☐ Do contact the bishop's office as early as possible to set up face-to-face meetings with the bishop. Scheduling these meetings can require up to a month in lead time. Please remember to call before you make travel arrangements for out-of-town finalists.
- ☐ Do plan to show the candidate the surrounding area and some of the local high spots.
- ☐ Do allow for some down time for the candidate to reflect on their experience in your parish.
- ☐ Decide in advance with whom the candidate should meet (e.g., search committee only, search committee and vestry, etc.) and be consistent. Candidates and church staff, including the transitional priest in charge, should have some time to meet each other as well, if possible.
- ☐ Do take care of all logistics prior to the candidate's arrival. Arrange for their pick-up at the airport, book (and pre-pay) a hotel room, make arrangements for the family to visit the local school (if appropriate), etc.

EPISCOPAL DIOCESE OF MASSACHUSETTS

Model Covenant of Ministry Between Rector and Vestry

This Covenant of Ministry is intended to be negotiated after the vestry has extended the initial call to the rector and it should be reviewed annually. Negotiations may be facilitated by the regional canon, if necessary. The model contains recommended provisions that may be varied according to particular contexts and circumstances. For a part-time position, the various sections should be prorated on the basis of a fraction (or percentage), e.g., half-time, three-quarters time, etc. Consult the current Diocesan Guidelines for Compensations and Benefits.

Covenant of Ministry

BETWEEN

The Rev. [Name] and the vestry of [Church Name] in [Town/City] Massachusetts, which has elected [Name] to be rector with the understanding that the rectorship shall continue until dissolved by mutual consent and affirmed by the bishop or by arbitration and decision as provided by Title III, Canon 9 or Title IV of The Episcopal Church.

The relationship between a rector and a vestry is unique, and it evolves within a larger covenant of mutual trust and ministry to each other. The purpose of this covenant of ministry is to strengthen that relationship by clarifying some of the practical arrangements and to reduce later misunderstandings.

Section A - COMPENSATION

1. The rector's salary will be \$ [Amount] per annum commencing on or about [Date]. It will be reviewed annually and adjusted according to diocesan Total Clergy Compensation guidelines.

The parties agree that the rector's Total Clergy Compensation ("TCC") will equal \$[Amount], including the amount of the housing allowance, if applicable, and [specify other].¹⁴

If, in the event of significant budget deficits, the vestry votes to reduce the salary of the rector, any such reduction shall not become effective for at least six months after the vestry vote has been taken and after the rector has been notified of the vote. Any such reduction shall be accompanied by an appropriate reduction in the percentage of time to be worked by the rector

¹⁴ Specify other compensation received by the rector that may be considered part of TCC. Consult the current Diocesan Guidelines for Compensation and Benefits.

and by such other amendments and additions to the agreement as shall be negotiated between the parties at the time.

2. Housing¹⁵ [**Option A** - Rector *will not* live in a rectory]

The vestry agrees to adopt annually the necessary resolution required by the Internal Revenue Service designating that portion of the TCC shown above as a housing allowance within the meaning of Section 1.107 of the IRS Code.¹⁶

[**Option B** - Rector will be living in a rectory]

The rector [and family] will live in the church-owned rectory. The vestry will be responsible for the following expenses:

- (a) Insurance (and property taxes, if any) on the property;
- (b) Maintenance or replacement of the following appliances: [Specify, such as refrigerator, dishwasher, etc.];
- (c) Maintenance of the structure(s), renovations or capital improvements;
- (d) [Specify other responsibilities, such as snow and leaf removal, etc.].

The rector [and family] are responsible for good stewardship in regard to the care of the rectory and will remain responsible for the general care and upkeep such as [specify particular responsibilities].¹⁷

The rector is expected to present an annual report to the vestry on the condition of the rectory, with particular attention to items requiring maintenance.

The vestry agrees to adopt annually the necessary resolution required by the Internal Revenue Service designating that portion of the TCC shown above as a housing allowance within the meaning of Section 1.107 of the IRS Code.

¹⁵ The model contains two options relative to housing. "Option A" applies to those situations where the rector will not live in a rectory. "Option B" applies to those situations where the rector will live in a church-provided rectory.

¹⁶ The amount of the TCC designated as a housing allowance should be the lesser of (1) the fair rental value for the housing; including furnishings and appurtenances (such as garage) and utilities or (2) the amount the rector expects to spend on housing.

¹⁷ The specific responsibilities of the vestry and rector will depend on the particular facts and circumstances. Once these are determined, they should be delineated with as much specificity as possible.

3. [Optional] Other Compensation: [Specify, e.g., SECA allowance, equity allowance, etc.].¹⁸

Section B - PREMIUMS

2. The vestry will pay the following premiums as required:
- (c) Pension premiums as required by the Church Pension Group based on the rector's TCC;
 - (d) The cost of medical insurance premiums [specify whether individual or family coverage, which includes domestic partners, where applicable] according to the percentage prescribed by diocesan policy.
2. The vestry will provide the following additional benefits [specify other benefits, e.g., dental, other insurance, life insurance for clergy not eligible for pension, etc. and allocation of premiums].
3. In the event of a total and permanent disability of the rector, or in the case of the death of the rector, the following agreements apply:
- (a) Regarding housing: _____ month(s) in rectory or _____ month(s) housing allowance.
 - (b) Regarding compensation (in the event of permanent disability of the rector):
_____ month(s) salary per year of service, up to a maximum of _____ month(s).

Section C - EXPENSES

The vestry agrees to pay for the following expenses incurred by the rector in fulfilling professional duties:

1. Moving expenses: The cost of moving the rector [and family] and household goods when the call has been accepted.
2. Travel: The vestry agrees to provide the rector with _____¹⁹

[Option A: reimbursement for all church-related automobile travel at the current rate established by the IRS.]

[Option B: a travel allowance of \$ _____ per year adjusted annually and included in the annual budget for all church-related automobile travel.]

¹⁸ Since a rector while living in a church-provided rectory will not build any equity in a home, a number of vestries have agreed to fund an equity allowance through contributions to a tax sheltered 403(b) plan. Such other compensation is includable as TCC.

¹⁹ Specify whether the rector will receive (1) travel reimbursement and, if so, at IRS rate, (2) an annual allowance or (3) an automobile. In any case, the rector will submit the expense reimbursement form.

[Option C: an automobile for purposes of church-related travel upon such terms as the vestry and the rector shall determine.]

3. Communications: To provide for a computer/laptop/tablet, Internet connection and a phone in the rector's office and a cell phone if needed. All postage for church business will be included in the parish budget.
4. Office: All necessary office furniture, equipment and supplies (computer, laptop, tablet, etc.) will be paid by the parish, the amount to be established in the annual budget.
5. Discretionary Fund: A fund will be provided for charities and expenditures at the discretion of the rector in accordance with the Diocesan Guidelines for Clergy Discretionary Funds, the amount to be established in the annual budget.
6. Guests and Hospitality: The rector will be reimbursed for the reasonable costs of hospitality and entertainment on behalf of the parish, the amount to be established in the annual budget.
7. Professional Fees: Dues of the rector to professional associations, the cost of the annual Clergy Conference with the bishops and the cost of professional periodicals, the amount to be established in the annual budget.
8. Continuing Education: The amount of \$ _____ annually to support the rector's continuing education and will be established in the annual budget. The rector is expected to make an annual report to the vestry on continuing education work.
9. The cost of supply clergy and pastoral services: when the rector is absent from the parish; the amount to be established in the annual budget.

Section D - LEAVE TIME²⁰

The vestry agrees that the rector shall have the following periods of leave at full pay:

1. _____ month(s) of vacation per year, including Sundays, plus
[_____].²¹
2. _____ weeks per year (in addition to vacation time) for continuing education and career development.

²⁰ Currently, one month of vacation per year and one week of continuing education/career development per year are the recommended minimum. Additional time off for clergy retreat is strongly encouraged.

²¹ Specify additional leave, e.g., amount of time after Christmas, amount of time after Easter and amount of other time as agreed upon with the vestry.

3. Sabbatical leave: The rector is eligible for three months of sabbatical leave for every five years of parish ministry, for the purpose of renewal, study, travel and continued spiritual growth. *[Congregations may wish to adapt this timeframe to fit their needs, or the needs of their clergy. For example, a priest may wish to have a longer leave after a longer number of years of service, or may wish to have shorter leaves after fewer years.]* An amount of \$_____per annum will be deposited in an account established for sabbatical preparedness.

Applications for diocesan support from the bishop's clergy sabbatical program can be obtained from the chair of the sabbatical committee. Application materials are also available for download at: <http://www.diomass.org/content/clergy-sabbatical-program> .

Planning for the rector's sabbatical shall begin at least nine months prior to the first day of the leave. The rector and vestry shall agree to the form this planning shall take. Both the rector and vestry will participate in this planning, which shall include financial and activity information about the sabbatical, provision for congregational life and continuity, and clergy support during the rector's absence.

4. [Specify other leaves.]²²

Section E - SUPPLEMENTARY COMPENSATION

The disposition of wedding, funeral and other fees will be determined in conjunction with the vestry and may be used to fund the discretionary fund.

The following understanding has been reached between the rector and the vestry concerning the income the rector may receive performing [specify].

Section F - USE OF BUILDINGS

In addition to the use and administration of parish buildings for the discharge of duties, the rector shall have the right to grant use of the buildings to individuals or groups from outside the parish under general conditions to be determined in conjunction with the vestry.

Section G - REGULAR PARISH GOAL SETTING

- a) Meetings between the rector and the wardens are required at least twice a month with encouragement to meet more often in periods and under circumstances where extra meetings would be helpful.
- b) The rector and vestry will review the mutual ministry of the parish, vestry and clergy on or about _____ (in no event more than one year)

²² Other such leave may include parental leave in the event of childbirth, adoption or foster care. Consult current Diocesan Guidelines for Compensation and Benefits.

from the rector's assumption of duties on the basis of goals and expectations set at the time of the call of the new rector. These initial goals and expectations are to be included in the covenant of ministry document and will be forwarded by the regional canon for review and approval by the bishop. Subsequently, periodic reviews (every year or two years) will be scheduled. These reviews for the purpose of goal setting will cover the following items:

1. What is the mission and goals of the parish as presently understood?
 2. What are the roles and tasks of the parish leaders (rector, vestry members and others) in accomplishing the goals?
 3. How well have the previously set goals been met?
 4. What goals and expectations will be set for the next period in the life of the parish?
- c) The rector is expected and encouraged to participate in regional, diocesan and wider church responsibilities as well as community endeavors. Further, time given to such work shall be understood as an integral part of the rector's ministry in the parish.

Finally, this covenant of ministry will be revised as desired with the mutual consent of rector and vestry, and at any rate it shall be reviewed and revised no later than [Date]. The bishop will review and sign the revised covenant of ministry.

Section H—TRANSITION REVIEW

The rector was shown and is fully aware of the content of the transition review report performed by

_____ **before the call was extended.**

Section I – STATEMENT OF NON-DISCRIMINATION

In accordance with the Canons of The Episcopal Church and the Diocese of Massachusetts, this congregation will not discriminate on grounds of race, color, ethnic origin, immigration status, national origin, sex, marital or family status (including pregnancy and child care plans), sexual orientation, gender identity and expression, disabilities or age.

SIGNATURES

Signatures are collected electronically. Please submit the completed covenant of ministry in .pdf form to your regional canon along with the e-mail addresses for all signers. Once all have signed the covenant of ministry, the completed covenant will be sent to all signers.

Date: _____ Rector: _____

Approved by the Vestry on: _____ Date _____

Warden_____

Warden_____

Clerk_____

Reviewed by Regional Canon

Date_____ Regional
Canon_____

Reviewed by the Bishop

Date_____ Bishop_____ **APPENDIX T**

Farewell Liturgy for Transition Ministry

Following the post-Communion prayer, the transitional priest in charge kneels at the communion rail. All come forward to lay hands on the transitional priest in charge, or on the shoulder of the person in front of them. When all are in place, a warden says,

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

A warden [or member of the vestry] continues,

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

A warden [or member of the vestry] asks the congregation,

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

People: We do.

The transitional priest in charge stands and says:

Let us pray. O God, you have bound us together for a time as clergy and people to work for the advancement of your kingdom in this place. We give you humble and hearty thanks for the ministry which we have shared in the time now past. We thank you for your never-failing presence with us through these years, and for the deeper knowledge of you and of each other which we have attained. We thank you for those who have been joined to this part of Christ's

family through baptism. We thank you for opening our hearts and minds again and again to your Word, and for feeding us abundantly with the Sacrament of the Body and Blood of your Son.

People:

Gracious God, be with *N.* as they leave. Grant that all of us, by drawing ever nearer to you, may always be close to each other in the communion of your saints. All this we ask for the sake of Jesus Christ, your Son, our Lord. Amen

The transitional priest in charge pronounces God's blessing.

APPENDIX U

To Welcome the New Rector

- Set up health insurance and pension through diocesan human resources personnel (ask the regional canon for assistance, if needed).
- Contact the regional canon to request a New Clergy Resource Packet.
- Have the rector's office cleaned, including the drapes and carpet where appropriate.
- If there is a closet, see that it is emptied, cleaned out and has some hangers.
- If there is a storage closet, have it cleaned out.
- Have desks, shelves and cupboards emptied and wiped down, and windows and windowsills washed.
- Have a set of keys ready that will include a master key, keys to the main office, staff offices and the sacristy.
- Prepare a folder that includes the following information:
 1. Current membership list and the most recent pictorial directory, if there is one.
 2. A roster of vestry members.
 3. A copy of the budget and minutes of the last three vestry meetings.
 4. A directory of ministries if there is one.
 5. Letters of agreement for current staff members and their job descriptions.
 6. A schedule and list of the duties of office volunteers.
 7. A copy of any policies, procedures or personnel guidelines.
 8. A copy of the parish bylaws and diocesan canons.
 9. The last two or three issues of the parish newsletter, weekly news bulletin and Sunday service leaflet.
 10. A roster of active committees.
 11. A map of the area.
 12. If there are guilds or other groups that meet regularly, provide a description of their activities and meeting schedule and their expectations of the rector.
 13. A calendar with key dates marked for upcoming parish events and what is expected of the rector.
 14. Diocesan resource packet with key information about the diocese.
- Assemble any passwords the rector will need such as those to a computer, security system or special accounts.

- Any liturgical customary or instruction manual for eucharistic visitors, acolytes, altar guild, chalice bearers, lectors and intercessors along with current Sunday schedules.
- Offer a tour of the building.
- Offer to arrange lunch with a neighboring priest and/or the dean who can provide information on the deanery, clergy meetings, Diocesan Convention dates, clergy days and other ecclesiastical matters.

APPENDIX V

Transition Review

Objective

Before a new priest is called by a parish, the bishop requires a review of the business affairs of that parish. This review helps the parish confirm its ability to compensate a new clergy person at the percent time that the parish desires. In addition, the process encourages a strong relationship between the diocesan consultants who conduct the transition review so that they can be a resource to the parish going forward.

Audience

The audiences for the transition review process are **the parish leadership, the bishops and canons and, very importantly, the clergy considering a call or appointment to the parish.** The transition review report will be useful to all of the above, though each will have a slightly different use for the information. The report will assist parish leadership in assessing financial health and ability to compensate new clergy. It will assist the bishop in making the decision to endorse the parish's plans. Finally, it will aid the clergy persons in their discernment of a call, by providing a full report of the business affairs of the parish. The vestry shares the transition review report with the priest during negotiations of the compensation package and the covenant of ministry or letter of agreement.

Steps

The regional canon initiates the process by sending an e-mail (or other communication) to the congregation's leadership, introducing the appointed consultant and briefly explaining the nature of the ministry that consultants are called to do. The regional canon also sends a copy of the e-mail to the appointed consultant and the conveners of the consultants. The business consultant then contacts the warden(s) of the parish, reiterates what they will be doing and sets up a meeting to get the process started.

The business consultant usually asks the parish leaders to assemble a set of documents in advance of their first meeting, namely, **recent annual parochial reports, the most recent audit report, the most recent bank, brokerage and investment statements, the balance sheet, the last few years' income and expense statements and the most recent treasurer's report to the vestry.** The leaders should have these documents available for the meeting or, better yet, forward them to the consultant in advance.

The first meeting should build trust and confidence between the consultant and the congregational leaders so that the balance of the process will go smoothly. A tour of the property (including the rectory and any other outbuildings if applicable) is appropriate. At this point, it is important that parish leaders familiarize themselves with diocesan compensation guidelines, because the vestry will calculate the Total Clergy Compensation (TCC) using these guidelines, and then use the resulting calculation in salary and benefits negotiations with the incoming priest. The diocesan compensation guidelines are included in the annual report of the diocesan Compensation and Benefits Committee and can be found on the diocesan website at <https://www.diomass.org/inside/docs/compensation-benefitsresources-congregations>.

In the review process, the business consultant will pay particular attention to the draw from the congregation's endowment. If the congregation is drawing more than 4% (or so), it is depleting its resources significantly. The consultant also will check to see that restricted funds are being used properly.

Ultimately, after one or more sessions, the transition review will address the following questions:

1. Is the parish in compliance with its administrative and financial obligations? If so,
 - a. Medical insurance payments are current.
 - b. Diocesan assessment payments are current.
 - c. The latest annual parochial report is recorded at the diocesan offices.
 - d. Insurance (property/casualty) is adequate and payments are current.
 - e. Pension payments are current.
 - f. The parish audit is current.
 - g. Loan payments, to the diocese or other entities, are current.
 - h. No other significant payables exist.
2. Is the parish's infrastructure sufficient? If so,
 - a. The treasurer and financial committees are capable.
 - b. The congregation is using appropriate software.
 - c. The congregation's banking and investment arrangements are sound.
 - d. There are financial resources available for an emergency.
 - e. The physical plant (including rectory and/or outbuildings) is in good shape.
3. Can the parish support the level of clergy (full-time or part-time) that it plans to search for?
If so,
 - a. The parish is properly computing the minimum and actual Total Clergy Compensation (TCC), using diocesan guidelines.
 - b. The parish can afford this TCC over a period of years.
 - c. The parish knows the cash effect of the proposed compensation (including fringe benefits that may not be in the TCC) and the secondary effects (e.g., reduced income from rental of a rectory).

- d. The parish can afford the search process it is intending to conduct.
4. Are there are any “red flags” that warn of impending problems? Is there:
- a. An unusual concentration of pledge income, with only a few pledgers?
 - b. An unusual amount of revenue from outside sources (e.g., rentals)?
 - c. An unusual number of important donors who are elderly?
 - d. An unusually high building cost per pledging unit (e.g., over \$1,000)?
 - e. An unusually high ratio of sanctuary capacity to average Sunday attendance (ASA)?
 - f. Any property tax issues?
 - g. An excessive draw (over 4% annually) from endowment funds?

Product (Transition Review Report)

After the product of this review has been approved by the consultants conveners, the bishop and regional canon will review it and approve the plan to call new clergy. The business consultant and regional canon, if possible, will meet in person with the parish leadership to review the report and answer questions. The vestry will share this transition review with the final list of candidates for rector or with candidates for appointment as priest-in-charge prior to the negotiation of the compensation package and the covenant of ministry.

Letter of Agreement for a Settled Priest-in-Charge

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This Letter of Agreement is intended to be negotiated after the bishop has appointed the priest-in-charge and it should be reviewed annually and adjusted according to TCC guidelines. Negotiations may be facilitated by the regional canon, if needed. The model contains recommended provisions that may be varied according to the particular contexts and circumstances. For a settled priest-in-charge in a part-time position, the various sections should be prorated on the basis of a fraction (or percentage), e.g., half-time, three-quarters time, etc. Consult the current Diocesan Guidelines for Compensation and Benefits.

Letter of Agreement

BETWEEN

The Rev. [Name], appointed by the Bishop of Massachusetts to serve as settled priest-in-charge, and the Vestry of [Church Name] in [Town/City], Massachusetts, enter into this agreement.

The settled priest-in-charge will serve at the discretion of the bishop diocesan. The settled priest-in-charge may terminate this agreement with 30 days' notice.

The settled priest-in-charge will serve beginning on [Date] and will serve for [##] months [years] at [##] hours per week subject to the discretion of the bishop diocesan. The parties agree that any changes in the terms and conditions of this agreement must first be approved by the bishop.

The settled priest-in-charge shall exercise the duties of rector, subject to the authority of the bishop, as provided in Canon III.9.3(c) of The Episcopal Church.

The regional canon will appoint a priest-in-charge consultant who will serve as an advisor for the settled priest-in-charge, the vestry and the congregation during the period of transition.

The relationship between a settled priest-in-charge and a vestry is unique, and it evolves within a larger covenant of mutual trust and ministry to each other consistent with the Constitution and Canons of The Episcopal Church and the Diocese of Massachusetts.

The purpose of this Letter of Agreement is to strengthen that relationship by clarifying some of the practical arrangements.

Section A - COMPENSATION

The salary of the settled priest-in-charge will be \$ [Amount] per annum commencing on or about [Date] and will be reviewed and adjusted annually to keep pace with the guidelines of the Compensation and Benefits Committee.

The parties agree that the Total Clergy Compensation (TCC) for the settled priest-in-charge will equal \$[Amount], including the amount of the housing allowance, if applicable, which corresponds to [Amount] % of full-time based on current diocesan Guidelines for Compensation and Benefits.²³

If in the event of significant budget deficits, the vestry votes to reduce the salary of the settled priest-in-charge, any such reduction shall not become effective for at least six months after the vestry vote has been taken and after the settled priest-in-charge has been notified of the vote. Any such reduction shall be accompanied by an appropriate reduction in the percentage of time to be worked by the priest-in-charge and by such other amendments and additions to the agreement as shall be negotiated between the parties at the time.

Housing²⁴

[Option A – Settled priest-in-charge *will not* live in a rectory]

The vestry agrees to adopt annually the necessary resolution required by the Internal Revenue Service designating that portion of the TCC shown above as a housing allowance within the meaning of Section 1.107 of the IRS Code.²⁵

[Option B – Settled priest-in-charge will live in a rectory]

The settled priest-in-charge [and family] will live in the church-owned rectory. The vestry will be responsible for the following expenses:

- (a) Insurance (and property taxes, if any) on the property;
- (b) Maintenance or replacement of some appliances;
- (c) Maintenance of the structure(s), renovations or capital improvements; (d) [Specify other responsibilities: e.g., snow and leaf removal, etc.].

The settled priest-in-charge [and family] are responsible for good stewardship in regard to the care of the rectory and will remain responsible for the general care and upkeep, such as [specify particular responsibilities].²⁶

The settled priest-in-charge is expected to present an annual report to the vestry on the condition of the rectory, with particular attention to items requiring maintenance.

²³ Specify other compensation received by the settled priest-in-charge that may be considered part of TCC. Consult the current diocesan Guidelines for Compensation and Benefits.

²⁴ The model contains two options relative to housing. "Option A" applies to those situations where the settled priest-in-charge will not live in a rectory. "Option B" applies to those situations where the settled priest-in-charge will live in a church-provided rectory.

²⁵ The amount of the TCC designated as a housing allowance should be the lesser of (1) the fair rental value for the housing: including furnishings and appurtenances (such as garage) and utilities or (2) the amount the settled priest-in-charge expects to spend on housing.

²⁶ The specific responsibilities of the vestry and settled priest-in-charge will depend on the particular facts and circumstances. Once these are determined, they should be delineated with as much specificity as possible.

The vestry agrees to adopt annually the necessary resolution required by the Internal Revenue Service designating that portion of the TCC shown above as a housing allowance within the meaning of Section 1.107 of the IRS Code.

[Optional] Other Compensation: [Specify, e.g., SECA allowance, equity allowance, etc]²⁷

Section B - PREMIUMS

1. The vestry will pay the following premiums as required:
 - (a) Pension premiums as required by the Church Pension Fund based on the TCC of the settled priest-in-charge;
 - (b) The cost of medical insurance premiums [specify whether individual or family coverage, which includes domestic partners where applicable] according to the percentage prescribed by diocesan policy.
2. The vestry will provide the following additional benefits [specify other benefits, e.g., dental, other insurance, life insurance for clergy not eligible for pension, etc. and allocation of premiums].
3. In the event of a total and permanent disability of the settled priest-in-charge, or in the case of the death of the settled priest-in-charge, the following agreements apply:
 - (a) Regarding housing: _____ month(s) in rectory or _____ month(s) housing allowance.
 - (b) Regarding compensation (in the event of permanent disability):
_____ month(s) salary per year of service, up to a maximum of _____ month(s).

Section C - EXPENSES

The vestry agrees to pay for the following expenses incurred by the settled priest-in-charge in fulfilling professional duties:

1. **Moving expenses:** The cost of moving the settled priest-in-charge [and family] and household goods once the appointment has been made and confirmed.
2. **Travel:** The vestry agrees to reimburse the settled priest-in-charge for church-related travel at the current rate established by the IRS up to the amount specified in the budget.
3. **Communications:** To provide for a computer/laptop/tablet, Internet connection and a phone in the office of the settled priest-in-charge and a cell phone, if necessary. All postage for church business will be included in the parish budget.

²⁷ Since a settled priest-in-charge while living in a church-provided rectory will not build any equity in a home, a number of vestries have agreed to fund an equity allowance through contributions to a tax sheltered 403(b) plan. Such other compensation is includable as TCC.

4. **Office:** All necessary office furniture, equipment and supplies will be paid by the parish, the amount to be established in the annual budget.
5. **Discretionary Fund:** A fund will be provided for charities and expenditures at the discretion of the settled priest-in-charge in accordance with the diocesan guidelines for clergy discretionary funds, the amount to be established in the annual budget.
6. **Guests and Hospitality:** The settled priest-in-charge will be reimbursed for the reasonable costs of hospitality and entertainment on behalf of the parish, the amount to be established in the annual budget.
7. **Professional Fees:** Dues of the settled priest-in-charge to professional associations, the cost of the annual Clergy Conference with the bishops and the cost of professional periodicals, the amount to be established in the annual budget.
8. **Continuing Education:** The amount of \$ _____ annually to support continuing education for the settled priest-in-charge. The settled priest-in-charge is expected to make an annual report to the vestry on continuing education work. The amount to be established in the annual budget.
9. The cost of supply clergy and pastoral services when the settled priest-in-charge is absent from the parish, the amount to be established in the annual budget.

Section D - LEAVE TIME

[Currently, four weeks of vacation per year and one week of continuing education/career development per year are the recommended minimum. Additional time off for clergy retreat is strongly encouraged. For employment periods longer than eight months but less than one year, the normal vacation leave for clergy (including Sundays) may be prorated.]

The vestry agrees the settled priest-in-charge shall have the following periods of leave at full pay:

1. _____ week(s) of vacation per year, including Sundays
2. _____ weeks per year (in addition to vacation time) for continuing education and career development. [and _____ days per year (in addition to the above) for retreat time.]
3. Other leaves: Sabbatical leave after five years in the parish if called as rector; related preparations will be done in consultation with the diocesan guidelines and \$ _____ per annum will be deposited in an account established for sabbatical preparedness. The priest-in-charge shall also have a day off after Christmas and Easter.²⁸

Section E - SUPPLEMENTARY COMPENSATION

Wedding, funeral and other fees allocations will be decided upon by mutual agreement of the priest-in-charge and the vestry. Such fee allocations may be used to fund the discretionary fund.

²⁸ Other leave may include parental leave in the event of childbirth, adoption, foster care or family leave. Consult the Guidelines for Compensations and Benefits.

The following understanding has been reached between the priest-in-charge and the vestry concerning the income the priest-in-charge may receive performing [specify].

Section F - USE OF BUILDINGS

In accordance with Canon III.9.6(a)(2) of The Episcopal Church, for the purposes of the office and for the full and free discharge of all functions and duties pertaining thereto, the settled priest-in-charge shall at all times be entitled to the use and control of the church and parish buildings together with all appurtenances and furniture, and to access to all records and registers maintained by or on behalf of the congregation.

Section G - MUTUAL MINISTRY AND RESPONSIBILITIES

Recognizing that the review of a congregation's total ministry should be a continuing process:

- 1) The settled priest-in-charge and the wardens are expected and encouraged to meet at least once every two weeks to discuss matters pertaining to the well-being of the people and facilities of the parish.
- 2) The settled priest-in-charge and the vestry agree to meet at least once a month (regular vestry meeting) to clarify expectations and to evaluate successes and raise concerns from the congregation, staff and leadership. Such meetings are intended to ensure the effectiveness of joint ministry of the lay leadership and clergy. Details of building status and church finances from the month shall be reviewed at each vestry meeting.

Suggested Tasks During the Period of Transition

The clergy person's appointment as a settled priest-in-charge is seen as a prime time for renewal, re-energizing the parish in its life and mission. Beyond maintaining effective ministry during this period, the vestry and settled priest-in-charge shall work together to prepare the congregation for a healthy future. Specific tasks to be addressed include, as needed: 1) Coming to terms with the history of the congregation and its relationships with previous clergy.

- 2) Discovering the congregation's special identity, what it dreams of being and doing apart from previous clergy leadership.
- 3) Dealing with shifts in leadership roles that naturally evolve in times of transition, allowing new leaders to come to the fore constructively.
- 4) Renewing and reworking relationships with the diocese, so that each may be a more effective resource and support to the other.
- 5) Building commitment to the leadership of the settled priest-in-charge in order to be prepared to move into the future with openness to new possibilities.
- 6) Help the congregation to develop and implement a successful stewardship campaign
- 7) Help the congregation explore evangelism and how it can be practiced in the parish and community
- 8) Help the congregation engage in Christian formation

Vestry Responsibilities

All ministries other than those reserved to ordained leadership (such as administering the sacraments) are understood as mutual ministries of the laity of the parish and the settled priest-in-charge. The vestry shall lead the laity to support and cooperate with the settled priest-in-charge in pursuit of parish goals.

The vestry is legal agent for the parish in all matters concerning its corporate property and in its relationship with the settled priest-in charge. The vestry will see that the settled priest-incharge is properly supported, personally and organizationally, as well as in the vestry's financial obligations to the priest-in-charge.

Settled Priest-in-Charge's Responsibilities

The settled priest-in-charge represents and extends the ministry which is the bishop's pastoral and canonical responsibility for congregations. The settled priest-in-charge shall lead the parish as pastor, priest and teacher, sharing in the councils of this congregation and of the whole church, in communion with the bishop. During the term of this agreement, and subject to the discretion of the bishop diocesan, the settled priest-in-charge shall have authority and responsibility for the conduct of the worship and the spiritual jurisdiction of the parish, subject to the rubrics of *The Book of Common Prayer*, the Constitution and Canons of this Church and the pastoral direction of the bishop.

The major goal of the settled priest-in-charge's ministry is to prepare the congregation for the next phase of its life. To this end, the priest-in-charge shall:

- a) Strive to implement the aforementioned tasks;
- b) Maintain the regular church ministries (worship services, preaching, pastoral care, education, etc.);
- c) Supervise all parish staff in the exercise of their responsibilities and ministries, for which they shall be accountable to the priest-in-charge;
- d) support the vestry in its responsibilities.

The settled priest-in-charge is expected and encouraged to participate in regional, deanery, diocesan and churchwide responsibilities, as well as community endeavors. Further, time given to such work shall be understood as an integral part of the priest-in-charge's ministry in the parish. Participation in such events is considered church-related business for the settled priest-incharge.

Mutual Review of Ministry

Annual Mutual Ministry Reviews will be undertaken beginning 12 months after the settled priest-in-charge has been appointed by the bishop, under the guidance of the priest-in-charge consultant. The Mutual Ministry Review will establish short term and long-term goals for the parish. The consultant will forward the reports of all reviews to the regional canon. Throughout the process, the priest-in-charge consultant will be in regular communication with the regional canon. The settled priest-in-charge and wardens are welcomed and encouraged to consult with the regional canon as needed throughout the process.

Section H - TRANSITION REVIEW

The settled priest-in-charge was shown and is fully aware of the content of the transition review report performed by _____ before appointment.

Section I - STATEMENT OF NON-DISCRIMINATION

In accordance with the Canons of The Episcopal Church and the Diocese of Massachusetts, this congregation will not discriminate on grounds of race, color, ethnic origin, immigration status, national origin, sex, marital or family status (including pregnancy and child care plans), sexual orientation, gender identity and expression, disabilities or age.

SIGNATURES

Signatures are collected electronically. Please submit the completed Letter of Agreement in .pdf form to the regional canon along with the e-mail addresses for all signers. Once all have signed the Letter of Agreement, the completed document will be sent to all signers.

Date_____	Settled _____	Priest-in-Charge:
Approved by the Vestry on:	Date_____	
	Warden_____	
	Warden_____	
	Clerk_____	

Reviewed by Regional Canon

Date_____ Regional
Canon_____

Reviewed by the Bishop

Date_____

Bishop_____

Reference I

Canons of The Episcopal Church Canon 9: Of the Life and Work of Priests

Canon III.9.3(b) Rectors.

- (1) When a Parish is without a Rector, the Wardens or other officers shall promptly notify the Ecclesiastical Authority in writing. If the Parish shall for thirty days fail to provide services of public worship, the Ecclesiastical Authority shall make provision for such worship.
- (2) No Parish may elect a Rector until the names of the proposed nominees have been forwarded to the Ecclesiastical Authority and a time, not exceeding sixty days, given to the Ecclesiastical Authority to communicate with the Vestry, nor until any such communication has been considered by the Vestry at a meeting duly called and held for that purpose.
- (3) Written notice of the election of a Rector, signed by the Wardens, shall be forwarded to the Ecclesiastical Authority. If the Ecclesiastical Authority is satisfied that the person so elected is a duly qualified Priest and that such Priest has accepted the office to which elected, the notice shall be sent to the Secretary of the Convention, who shall record it. Race, color, ethnic origin, sex, national origin, marital status, sexual orientation, disabilities or age, except as otherwise specified by these Canons, shall not be a factor in the determination of the Ecclesiastical Authority as to whether such person is a duly qualified Priest. The recorded notice shall be sufficient evidence of the relationship between the Priest and the Parish.
- (4) Rectors may have a letter of agreement with the Parish setting forth mutual responsibilities, subject to the Bishop's approval.

Canon III.9.3(c) Priests-in-Charge.

After consultation with the Vestry, the Bishop may appoint a Priest to serve as Priest-in-Charge of any congregation in which there is no Rector. In such congregations, the Priest-in-Charge shall exercise the duties of Rector outlined in Canon III.9.6 subject to the authority of the Bishop.

Canon III.9.6 Rectors and Priests-in-Charge and Their Duties

- (a) (1) The Rector or Priest-in-Charge shall have full authority and responsibility for the conduct of the worship and the spiritual jurisdiction of the Parish, subject to the Rubrics of the Book of Common Prayer, the Constitution and Canons of this Church, and the pastoral direction of the Bishop.
- (2) For the purposes of the office and for the full and free discharge of all functions and duties pertaining thereto, the Rector or Priest-in-Charge shall at all times be entitled to the use and control of the Church and Parish buildings together with all appurtenances and furniture, and to access to all records and registers maintained by or on behalf of the congregation.
- (b) (1) It shall be the duty of the Rector or Priest-in-Charge to ensure all persons in their charge receive Instruction in the Holy Scriptures; in the subjects contained in An Outline of the Faith, commonly called the Catechism; in the doctrine, discipline, and worship of this Church; and in the exercise of their ministry as baptized persons.
- (2) It shall be the duty of Rectors or Priests-in-Charge to ensure that all persons in their charge are instructed concerning Christian stewardship, including: (i) reverence for the creation and the right use of God's gifts;

- (ii) generous and consistent offering of time, talent, and treasure for the mission and ministry of the Church at home and abroad;
 - (iii) the biblical standard of the tithe for financial stewardship; and
 - (iv) the responsibility of all persons to make a will as prescribed in the Book of Common Prayer.
- (3) It shall be the duty of Rectors or Priests-in-Charge to ensure that persons be prepared for Baptism. Before baptizing infants or children, Rectors or Priests-in-Charge shall ensure that sponsors be prepared by instructing both the parents and the Godparents concerning the significance of Holy Baptism, the responsibilities of parents and Godparents for the Christian training of the baptized child, and how these obligations may properly be discharged.
- (4) It shall be the duty of Rectors or Priests-in-Charge to encourage and ensure the preparation of persons for Confirmation, Reception, and the Reaffirmation of Baptismal Vows, and to be ready to present them to the Bishop with a list of their names.
- (5) On notice being received of the Bishop's intention to visit any congregation, the Rector or Priest-in-Charge shall announce the fact to the congregation. At every visitation it shall be the duty of the Rector or Priest-in-Charge and the Wardens, Vestry or other officers, to exhibit to the Bishop the Parish Register and to give information as to the state of the congregation, spiritual and temporal, in such categories as the Bishop shall have previously requested in writing.
- (6) The Alms and Contributions, not otherwise specifically designated, at the Administration of the Holy Communion on one Sunday in each calendar month, and other offerings for the poor, shall be deposited with the Rector or Priest-in-Charge or with such Church officer as the Rector or Priest-in-Charge shall appoint to be applied to such pious and charitable uses as the Rector or Priest-in-Charge shall determine. When a Parish is without a Rector or Priest-in-Charge, the Vestry shall designate a member of the Parish to fulfill this function.
- (7) Whenever the HOUSE OF Bishops shall publish a Pastoral Letter, it shall be the duty of the Rector or Priest-in-Charge to read it to the congregation on some occasion of public worship on a Lord's Day, or to cause copies of the same to be distributed to the members of the congregation, not later than thirty days after receipt.
- (8) Whenever the House of Bishops shall adopt a Position Paper, and require communication of the content of the Paper to the membership of the Church, the Rector or Priest-in-Charge shall so communicate the Paper in the manner set forth in the preceding section of this Canon.
- (c) (1) It shall be the duty of the Rector or Priest-in-Charge to record in the Parish Register all Baptisms, Confirmations (including the canonical equivalents in Canon I.17.1(d)), Marriages and Burials.
- (2) The registry of each Baptism shall be signed by the officiating Member of the Clergy.
- (3) The Rector or Priest-in-Charge shall record in the Parish Register all persons who have received Holy Baptism, all communicants, all persons who have received Confirmation (including the canonical equivalents in Canon I.17.1(d)), all persons who have died, and all persons who have been received or removed by letter of transfer. The Rector or Priest-in-Charge shall also designate in the Parish Register the names of (1) those persons whose domicile is unknown, (2) those persons whose domicile is known but are inactive, and (3) those families and persons who are active within the congregation. The Parish Register shall remain with the congregation at all times.