The Episcopal Church in Maine

A Guide to Clergy Transitions

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Introduction To Clergy Transitions

The time between the departure of a priest and the arrival of their successor is a rich and complicated time in the life of most congregations. Many things seem to happen all at once:

- There is usually a period of intense anxiety, especially right around the time the former priest leaves.
- Lay leadership—vestry and wardens—suddenly find themselves responsible for aspects of church life that they may not previously have had to pay attention to.
- The congregation as a whole has to deal with the emotional subtlety of missing a priest they knew and loved, while also recognizing that any priest's limitations become more obvious as soon as they're gone.
- In time, the congregation needs to give new thought to the role of the priest, who is after all just one part of the congregation. What should the next priest do? What should they help the congregation become?
- This is also a time to face up to financial and other realities: before the congregation makes a fresh commitment to a particular form of ministry, and before it makes promises of support to a new priest, what do the numbers suggest is possible? What do they suggest is desirable?
- The process of searching for and finding a new priest will take a great deal of energy from a small number of people, especially the Discernment Committee (formerly known as the "Search Committee"), while everyone else will be occupied with the ongoing life of the congregation.
- The process will be different than it was in the past, and people who have been part of committees in the past will notice that:
    - (a) There are fewer candidates. The number of retirements in The Episcopal Church is vastly outpacing the number of ordinations. The inevitable effect is that there are far fewer clergy looking for positions than in the past; those who are looking are often at the peak of their ministries, and in many cases are looking to serve in large and challenging contexts (such as large parishes in big cities).
    - (b) As a consequence, candidates may come in one at a time, rather than in a "pool." This is especially true for part time calls, and in geographically remote areas. This means that Discernment Committees often have to interview and decide about whether a candidate is called to the congregation without the benefit of side by side comparison.
    - (c) The process is more streamlined. Once upon a time, congregations engaged in lengthy self-studies, and then put together "profiles" that resembled glossy magazines. All that has changed: Rather than doing elaborate surveys, congregations invite members to offer their thoughts about answers to the narrative questions posed on the Office of Transition Ministries (OTM) Portfolio —see below for what that means. And there is no longer a need for printed profiles; instead the parish web site fills that function, in recognition that prospective applicants look to the same sources of information as anyone else to learn about the congregation.

(d) Most authority rests with the congregation, through its Vestry or Bishop's Committee, and the Discernment Committee it may appoint. In the past, the Bishop's Office offered a lot of directions, even rules. That has changed; as the Canon will surely say, "I am not the boss of you." The Bishop's Office, working through the Canon to the Ordinary, is here to serve, support, and consult. Part of that consultation will be advice about what has worked well in other places, and how clergy searching for new calls expect the process to work—the congregation needs to know that it is participating in the church's call process in a way can be effective. Sometimes there may be strong advice about things that have worked poorly elsewhere. There are a few actual rules (for instance, background checks are obligatory), but in general, decisions about the process, and responsibility for moving forward, properly belong to the congregation.

Transition does not last forever (though when you're in the middle of it, it can feel as though it does). How long it does last depends on the congregation, and on the movement of the Spirit—it doesn't end until the right person is identified, is called, and accepts the call. The theoretical minimum is probably six months, but even though almost every congregation wants to move smartly, the norm is closer to a year, and in cases where applicants come in slowly, it can take much longer to find the right person.

A Note About Searches During the Pandemic

This Guide was originally created in 2014 and most recently revised in 2017. As I revise it again in 2020, the world is living through the COVID-19 pandemic, which is affecting everything we do in ways that seem to change daily. Many of the steps outlined in this guide assume the possibility and wisdom of in-person gatherings in a way that does not match current realities. We are still learning how to adapt our processes for the current situation. This guide, with a few exceptions, will continue to describe the process as it is implemented in "normal" times; Vestries and Discernment Committees should work with Canon Ambler to decide how to make appropriate adjustments under whatever the circumstances may be at the time.

This guide is meant to outline the process as it's generally being conducted as of mid-2020. It's a little different than it was a year ago, and next year will probably be different again. That is to say: this is a changing landscape, and a guide is not a mandate. We may learn together that some of what has been working up to now needs to change again… so please, let me know what works, and what seems to need re-thinking.

To make the process comprehensible, the guide breaks it down into five "phases:"

1. Preliminaries
2. Extending the Invitation to Candidates
3. Receiving Applications
4. From Application to Decision
5. Making the Call

I hope in these materials to give enough detail so that the various participants in the process can plan their work, but not so much detail that they die of process-overload. At heart, this is a simple undertaking: we prepare a good invitation; we publicize it well; we look at who responds; and discern whom the Spirit is calling as the new priest.

There are a few key touchstones: those of **prayerfulness**, of **confidentiality**, and of **hospitality**. Beyond those things, though, the process can be adapted to fit the specific circumstances of each congregation. The point is not to have process for process' sake, but rather to structure a careful, spiritually fulfilling method for assessing gifts and needs of both congregation and candidates, and ultimately finding the priest best suited to join the congregation in the next years of its ministry.

All along the way, the Wardens and the Discernment Committee will have the companionship of the Canon to the Ordinary,[1] who serves as the diocesan transition minister. No congregation makes this journey alone: God is with you, and so is the diocese, at the other end of a phone call whenever it would be helpful.

> *Draw your Church together, O God, into one great company of disciples, together following our Lord Jesus Christ into every walk of life, together serving him in his mission to the world, and together witnessing to his love in every city and town. Amen.*
>
> —from A *New Zealand Prayer Book* (slightly adapted)

[1] There are several Diocesan Canons; for simplicity, this Guide uses the term "the Canon" to refer to the Canon to the Ordinary, who serves as the Transition Minister for the Diocese of Maine.

Phase1: Preliminaries

When the current priest announces an intention to depart, the most important thing is for the congregation to say a good farewell—a good ending is important in itself, and is also the foundation for a good new beginning thereafter. However, the old standard that nothing should be done in terms of the transition process until the incumbent is gone, no longer holds.

Saying a Good Goodbye to the departing Priest

It's human nature to look to the future, but preparing well for that future means taking good care in the present. The priest who is leaving has been an important part of the life of the congregation, and being appreciative and intentional about the ending of their ministry honors both the priest, and the chapter of the congregation's life that the priest helped write. It also helps ensure that unfinished business is addressed: either completed, or at least identified for future attention.

A good farewell includes:

- An opportunity for members of the congregation and the priest to offer thanks, to address and resolve outstanding issues, and generally bring their relationship to a close.
- A discussion about future relationships. Generally the priest is expected to step away from all pastoral leadership and roles, and to return only at the discretion and invitation of the successor priest. This is intended to honor the reality that the congregation and priest are parting ways, and allow each the holy freedom to discern new directions.
    - The Church has clear expectations about the relationship between a former priest and congregation. These are detailed in a May 2020 letter from Bishop Brown to the clergy, the text of which appears as **Appendix I** to this Guide.
    - The Wardens should review this document with the departing priest to ensure that everyone has a shared understanding. In some cases it might be helpful to share the document with the whole congregation, especially if the priest is remaining in the area.
    - If there are questions or a need for interpretation in light of particular circumstances, it's important to consult with the Canon or the Bishop.
- Usually, a party and a chance to celebrate and wish each other Godspeed; and a final Sunday service at which the Bishop or Canon participates to offer the thanks and blessings of the Diocese.
- A meeting between the Canon and the Vestry to discuss the plans for transition. Often this meeting is followed the same evening by an open meeting between the Canon and the congregation so that everyone can hear first hand what the plans are.
- The Senior Warden, or other person designated, begins to line up supply clergy or make other plans for services after the priest departs. The Diocese maintains a list of clergy generally available for supply; priests in good standing who are not on the list (for instance, retired clergy who worship with the congregation regularly but don't generally want to supply) can certainly be invited as well. Many congregations use Morning Prayer for some Sundays, which provides an opportunity for new or existing lay leadership.

Organizing the Transition

There are several things the Vestry will need to decide early on, and if the the Vestry has the time and focus to start that process before the current priest departs, that's great. (The current priest does not take part in these discussions, nor attend vestry meetings where they are on the agenda.) These include what sort of priestly ministry the congregation will have during the transition, whether to appoint a Discernment Committee or have the Vestry itself function as the Committee, and how to make decisions in the transition process.

<u>Decision about an Interim</u>

At some point, before or soon after the priest departs, the Canon and the Vestry should discuss the pros and cons of seeking an interim priest (or "Transition Priest in Charge"). Factors to consider include

1. *Availability*. There is currently a lot more demand for interims than there are interims to meet that demand.
2. *Cost*. Interims need about the same compensation that permanent priests do—sometimes a little more, because it's actually pretty expensive to move and take on short-term work.
3. *Stability*. Interims can help a congregation maintain a sense of normalcy, and keep projects and administration going.
4. *Healing*. In some cases the congregation needs help with healing or reconciliation, and good interims are skilled at such work
5. *Breaking bad habits*. The best interims are the ones who can help use the "in between" time to encourage congregations to jettison habits that aren't helping.

<u>Decisions about the Process</u>

The Vestry can begin deciding whether to serve as the Discernment Committee, or appoint a separate Committee. Generally in smaller congregations the Vestry chooses to do this work itself; in larger congregations, to appoint a separate Committee.

If the Vestry does choose to appoint a separate Committee, a lot of the groundwork can happen before the current priest departs (though announcement of the committee, and commissioning, should probably wait). There is information in **Appendix II** about how to appoint a good Discernment Committee. The Vestry should give the Committee specific instructions, called a "charge," a model of which is in **Appendix III**. When the Committee begins its work, it should be commissioned during a Sunday service, with prayers and an explanation of its mission. The Canon can help offer commissioning liturgies and suggestions.

The Vestry should discuss and make appropriate budget provisions for the transition work. With minor exceptions, the parts that cost money come at the end: paying for candidate visits and discernment committee site visits, and the cost of finalist background checks. See **Appendix IV** for suggestions about forecasting costs.

Deciding how to Make Decisions

Whether the Vestry appoints a Discernment Committee or serves as the Committee, it's important to reflect on how this work is different from ordinary church business. Normally we work by majority rule (though even there, divided votes are not necessarily a wise way to build a congregation). But searching for a new priest invites a different spirit, and it's important to recognize from the outset that a divided call is not a good call. That means figuring out how to work together in a way that allows the sense of the group, rather than a bare majority, to prevail, and brings along those who have divergent viewpoints.

As one of its first acts, the Committee (or Vestry acting as the Committee) should discuss and decide how it will make its decisions. The key options include:

1. *Majority Rule*: Take a vote; whichever side has more votes, wins. The advantage of this approach: It's efficient. The disadvantage: Up to 50% of the group can feel left out of and angry at each and every decision, which is a lot of opportunity for bad feeling. For that reason, this is not the recommended way to go.

2. *Unanimity*: No decision is made until everyone agrees. The advantage: Everyone stays happy (or pretends to). The disadvantage: Everyone gets a veto, and there's the risk of infinite and unbreakable gridlock on each and every decision. Also not recommended.

3. *Consensus*: A decision represents the weight of opinion in the group, but is not finalized until everyone in the group can support it (even those who would have preferred a different decision). Advantage: it keeps the group unified, and fosters trust. Disadvantage: it relies on the good faith of all participants, and can require some painstaking negotiation to reach outcomes acceptable to all. Here the advantages heavily outweigh the disadvantages, and this is the way practically all successful transition processes are done.

Phase 2. Extending the Invitation to Potential Candidates

The first thing the Discernment Committee (or the Vestry acting as the Discernment Committee) does is to lead the congregation in preparing an invitation that will help prospective candidates learn of the opening and decide whether they are called to enter the process by submitting an application. This invitation phase typically involves two key steps.

The Office of Transition Ministry (OTM) Portfolio

First, the Committee needs to prepare answers to the twelve short-answer questions contained in the OTM Portfolio (that is, the Office of Transition Ministry's on-line clergy-and-congregation matching instrument). Both clergy and candidates prepare similar Portfolios, and while the questions are not perfect, in practice they are enormously helpful. While the Discernment Committee prepares the short answers, it's important that all members of the congregation be invited to offer input.   The OTM questions, and a structure for efficiently inviting broad participation, are contained in **Appendix V**.

Once the answers are ready, the Committee should send them to the Canon for preliminary review and comment. There is usually a need for at least one round of revisions, and the Canon will happily offer suggestions for how to make the answers best represent the congregation. Then the congregation as a whole should have a chance to review and comment, and any revisions should go to the Canon for final review. At the same time, the Canon will prepare the other information required by the Portfolio, and send it to the Committee and the Senior Warden for review and approval. When everything is ready, the completed Portfolio will be posted on line, and candidates invited to apply.

The Congregation Web Site

At the same time as it prepares the OTM Portfolio, the Committee should take a careful look at the congregation's website. Candidates seek information about a congregation the same way that others do: they Google the town and the congregation! They will pay close attention to what the website says, and how it says it. There are a couple of headline things to pay particular attention to.

First, the site needs to be a good reflection of the congregation itself. It should be clean, accurate, and up to date. It should list service times and the church location clearly, and should be regularly "swept out" so that outdated information is deleted.[2] A simple site is fine, particularly if the congregation structure is also simple, but it should be clear, inviting, and lively. Photos help a lot; it's worth posting them and refreshing them from time to time.

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[2] The website is not the archive. Short articles about great things that have happened are fine, but even they shouldn't stay up too long. Any announcement of an upcoming event has to come down once the event has happened, or the website looks dead, and if the website is meant to represent the congregation, then that's a bad thing.

Second, the Committee should create a section of the site, easily found by visitors, dedicated to the transition. That site might be called “Transition” or “Search”. It should contain at least two items:

1. A letter from the Committee to potential applicants. This is your chance to say things that are important that the rigid structure of the OTM Portfolio does not make room for. What do you love, what are you good at, what do you worry about and struggle with? Most usefully, what are you hoping your next priest will help you *do*?[3] The letter should be warm and inviting, and urge candidates to discern whether they are called to have a conversation about the possibilities of ministry with the congregation—and if so, to apply.

2. A regular update from the Committee about where the process stands. This is part of the way the committee can make sure that everyone always knows what’s going on. The entire process should be transparent, except for the information about candidates that has to be confidential.

Getting the Word Out

Word of the congregation’s search will go out in a number of ways. First is the OTM system. The OTM Portfolio goes into a database maintained by The Episcopal Church for clergy and congregations church-wide, and clergy who are seriously seeking a new call review that database regularly.

In addition, we’ll list the congregation on the Diocesan website, which also includes instructions for how to apply (see below). There are a number of clergy out there who are looking and waiting for opportunities in Maine, and they keep up with congregations in search.

We as a Diocese are part of the Transition Ministry Conference (TMC), which is two things really: a twice a year in-person meeting (happening virtually during the pandemic), where the Canon gathers with colleagues from all over the Northeast quarter of the United States; and an on-line jobs board which priests may find easier to navigate than the OTM system—they’ll find an interesting congregation on the TMC site, and then they’ll look up the OTM Portfolio for that congregation.

The Episcopal News Service (ENS) also maintains a jobs board that has become increasingly important in recent years: more and more candidates seem to use it as a primary source of information about potential calls, and we’ve found it important to be listed there. A basic listing is free, but there is an option to pay for it to become a “featured” listing, which greatly increases its prominence. That’s a decision for the Committee and the Vestry; it seems a good investment of a few hundred dollars, and is encouraged. Once the free listing is posted, the Canon will

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[3] You may note that there’s no suggestion that the Committee describe its ideal priest. The reason is that all those descriptions are just about the same. Everyone wants a priest who is spiritually grounded, has a sense of humor, likes children and dogs, is a wonderful preacher, a skilled administrator, takes the work seriously but themself lightly, and is good with shut-ins. Since every congregation wants that, and every priest thinks they are that, it’s pretty much a waste of time to say it.

receive an email from ENS offering to make the listing featured and spelling out the cost; the Canon will forward that email to the appropriate person in the congregation, who can then be in touch with ENS directly if the decision is to pay for a featured listing.

Finally there's the personal touch. The Canon knows of clergy who are open to new calls, and will reach out to them. Anyone else can and should do the same! The Committee should invite members of the congregation to think of good clergy they know who may be looking for new ministries, and invite them to consider applying. Summer visitors may be a help as well: as they fan out to their rest-of-the-year homes, ask them to help spread the word among good clergy they know elsewhere. In every case, make sure clergy know that if they have questions about how to apply, they should contact the Canon.

Phase 3: Receiving Applications

However the candidate learns of the opportunity, the process for applying is the same. We always ask for three things: the candidate's OTM Portfolio, a resume, and a cover letter, sent to the Canon for transmission onward to the Committee as soon as the Canon has made sure the candidate is eligible to apply. Here's a little more detail on applications and how they are handled.

What an Application Includes

Every candidate will have their own OTM Portfolio. In it, they do almost exactly the same thing the congregation does: they answer essentially the same twelve short answer questions; they list past experiences; and they offer insights into how they go about ministry. This is great: while not everyone loves all of the short-answer questions, almost everyone does find it helpful to be able to put the congregation's narrative side by side with the candidate's, and see if there's a potential fit. It's also helpful that every candidate provides similar information in a consistent format; and this is even more important when candidates come individually rather than in pools as in the past. The OTM also gives savvy candidates a place to provide links to sermons and other materials which in earlier days were not available, if at all, until much later in the process.

The drawback to the OTM Portfolio is that they all have the same format, and you can learn a lot about candidates by seeing what they say when they're not so constrained. For that reason we also ask for a resume, which lets applicants make their own choices about how to present information and what to emphasize.

And we ask for a cover letter, addressed to the Committee, but sent with the other materials to the Canon, introducing the applicant and describing why they feel drawn into conversation with the Committee about the possibility of ministry. We give no further guidance about how to prepare this letter, because the purpose is to let applicants express themselves in whatever way seems appropriate to them.

How we Receive, Handle, and Forward Applications

Applications are almost always received electronically (paper applications are acceptable but have become extremely rare, and suggest that the candidate may not navigate electronic media very effectively). The instructions are very clear that applications are to go to the Canon and not the Committee directly. Almost all applicants follow that protocol, and those few who don't may be sending a troubling signal. If the Committee does receive anything directly, it should be forwarded to the Canon right away.

Here's why. When an application comes in, the Canon first checks with his counterpart in the applicant's diocese to see if there are any reasons the applicant is not eligible to be a candidate. This is referred to as a "red flag check," and it's a very preliminary screen, designed to prevent applicants from going forward who should not be in the process at all (for instance, those trying to run away from trouble in their home dioceses). Such red flags are rare, and in the few cases where there have been, it's been great to learn about them early. If there is a red flag, the Canon will not forward the application to the Committee but will deal directly with the applicant and their home diocese. In every other case, the Canon will forward applications whether they seem good, bad, or indifferent, because discernment belongs to the Committee. Often the Canon will learn information that the Committee could find helpful, and will share that information as the Committee may wish.

Following the red flag check the application goes to the Committee. Unless another procedure has been established, this will happen by the Canon forwarding the application to the Committee chair, who is then responsible for distributing it to other members.

A Word About Confidentiality

From the moment the Committee receives an application, it assumes the duty of safeguarding the applicant's confidentiality. Committee members may not share any details at all about applicants: obviously not names, but also not details about age, gender, geographic location, make of car, whether it's a dog or a cat person, or anything else no matter how inconsequential. In a world of Google searches, it takes only one or two data points for a diligent searcher to figure out who a candidate is. Think of it this way: it's good that members of the congregation are curious, and since they're curious, it's natural that they should try to find out all that they can. *It's the Committee's job to see to it that they don't succeed even a tiny little bit.*

This means more than not blabbing. It also means being careful about emails—every Committee member should use a private email address that no one else shares. It means being vigilant about papers and where they are left; and about conversations and whether they can be overheard. The reason for all this seriousness is the profound harm that can come even from innocent mistakes. Breaches of confidentiality, even unintentional ones, have derailed search processes, divided congregations, and betrayed candidates. Remember, only one of your candidates will be chosen.

The duty of confidentiality extends beyond the search. Once the new priest is called and accepts the call, that person's name is obviously public. But their materials are not: they get to introduce themselves to the congregation as they choose, and committee members should not tell their stories for them. Even more importantly, the identities and materials of those *not* called should never be shared, ever, until the end of time. To ensure against inadvertent disclosure, materials of all candidates other than the one called should be carefully deleted or destroyed at the end of the process.

Phase 4: From Application to Decision

This section, more than any other, will need to be adapted to evolving circumstances as the Covid-19 Pandemic continues to unfold. In many cases it may be impracticable to do in-person interviews, especially of candidates who would have to travel long distances, and the Canon will be ready to consult about what to do instead.

Once the first application comes in, the Committee's role changes radically. Formerly it was in the business of inviting as broadly and effectively as possible, and nothing it was doing was confidential. Now it has to scrutinize an actual application from an actual priest, carefully and prayerfully discern whether that priest is called by God to serve in that particular congregation, while letting everyone in the congregation know where the process stands and simultaneously guarding the identity of each applicant. It's all do-able, but it takes care. Here are the steps.

Note that the following steps are presented as if there is only one candidate at a time. If there is a "pool" of candidates to discern among, then to the extent possible, each step should be completed for all candidates before the Committee makes the decision about which candidates to continue forward with into the next step.

Reviewing the Application

Committee members review the application materials, and the Committee decides whether it wants to move forward to an interview. This should be the subject of a thoughtful, prayerful discussion, whether in person or by video conference (such as Zoom). Generally, because the initial video interview costs so little in terms of time and money, the threshold should be low. If the written materials make it plain that the priest is not the right fit, then of course there's no reason for an interview; but if there's any question at all, it seems worth spending an hour together to answer it.[4]

Following this meeting, the Committee chair or other designated person should communicate to the applicant and let them know what the Committee has done, and if the decision is to go forward, what the next step is and when it will happen.

A word about communication: the chair of the Committee should take responsibility for ensuring that every candidate always knows what is happening in the process, and when the next step will take place. Similarly, the congregation should get frequent updates about where the process stands. Even if nothing much is happening other than waiting for applications, that should be communicated regularly.

[4] The calculus might be different in the rare instance where there is a large pool of applications; in those cases following up on a limited subset might be good stewardship of the Committee's energy and attention.

That next step is generally a video interview. In rare cases, the Committee might want to ask candidates for answers to written questions (this used to be common, but the OTM narratives have generally replaced this step). If the Committee wants to consider written questions, the Canon can help.

Video Interviews

If the Committee decides to go forward with the applicant, the next step is to schedule a video interview. Topic areas for interviews are prepared in advance, with assistance as needed from the Canon, and agreed to by the entire Committee. The Canon has a list of suggested interview topics (not included in this Guide) which the Committee should request and review. Interviews are generally 45 minutes to an hour, in consistent format, attended by entire Committee.

There are a number of video conference services; Zoom in particular has become familiar to many as a result of the pandemic. Before the first interview, the Committee should do a dry run video call, to make sure that the service works the way it's expected to, the directions the Committee gives to the applicant are clear and work properly, and that the Committee's web connection, computer, camera, and everything else work right. The Diocese has a Zoom account which is available to the Committee; check with the Canon if you want to use it.

The best interviews are structured as conversations. The Committee should decide in advance on five or six topic areas, and have a couple of questions in mind to open the discussion on each. The goal is not to quiz the candidate on what they have done or would do in specific situations, and certainly not to demand that they answer questions that have eluded the entire Church for decades ("how will you fill up our Sunday School again?" is an impossible question, and no sensible priest would go to a congregation where that was the expectation!). Rather, the goal is to find out how the person thinks, what their deep beliefs are, how they communicate, whether they are a leader the Committee might want to gather around. Is this a person you are starting to like? To trust? Do you want to spend more time with them? Those are the key questions; the interview topics are just ways of getting to that insight.[5]

It may be helpful to designate Committee members to be note-takers. One way to do this would be to assign one topic to each member, and have that person take notes of each Candidate's discussion of that topic.

In-Person Interviews: the Candidate Visit

Following the video interview, the Committee again meets, and discerns whether it feels drawn to continue the process with the candidate. Once again this should be a careful, prayerful discussion, and should take place in person (or by video conference, as the case may be).

The stakes are getting higher now, because up to this point, the process has not cost much money, and the candidate has not had to disrupt their normal life. The in-person interview is different:

[5] On occasion, there may be a specific skill set that a congregation needs its next priest to have. If that's the case, then of course it's a good idea for that to be among the topics covered in the interview.

the candidate now travels to visit the Committee and see the church and the community. The costs of the trip for the candidate and members of the candidate's household are absorbed by the congregation.

> Even during the pandemic, it's worth trying to find a way—if possible—to get the candidate here in person. The interviews will have to be adapted, to be sure; but if the candidate is contemplating moving here from away, it's still important that they and their household get a chance to visit the church and the town, so that they can discern whether this is a move that is right for them. As always, the Canon is here to help think through how to make all this work.

This is a good time to ask the Canon to have the Bishop to check with the candidate's Bishop. The Bishop has to consent to any call, and if there's a hitch (there rarely is, but still), now is the time to find out.

For the same reason the Bishop will also meet with the candidate. It's great if this can happen when they are in Maine for their in-person interview, though for reasons of scheduling it often ends up by phone or by Zoom. The Committee should be in touch with the Canon to make the necessary arrangements.

Here are some guidelines for setting up an in-person interview, subject to modification as necessary:

- The visit is usually an overnight. It can be structured to meet everyone's schedules as best as possible, but there should be time for an extended interview conversation, a meal together, a tour of the church and the town, and for the candidate to lead a service for the Committee.
- Members of the candidate's household should be invited to come and to participate in the visit (except for the formal interview), since they have a significant stake the conversation and need to form their own discernment.
- Interview topics are decided by the Committee ahead of time, with advice from the Canon as needed.
- The candidate is interviewed off-site or at a time when no other activities are taking place at the church in order to maintain confidentiality.
- The candidate is offered the chance to ask questions of the Committee, and to see and learn about the church and community. But be careful about confidentiality when showing a candidate around. Particularly in small towns, it can take some subtlety to avoid having everyone figure out exactly what is happening. It may help to ask the candidate to bring ordinary street clothes with them for when they are out and about.
- There should be some down time built into the schedule, so that the candidate and their family can reflect, pray, talk among themselves, and rest—being interviewed is grueling for some people. The overnight accommodations should be comfortable and private, and should not be in a Committee member's house.

This is the time to talk with the Canon about starting a background check. We use Oxford Document Management for our backgrounding; their process is extensive and it takes time, but the cost is high enough that we don't want to do it until it's clear that a call is in the wind. Generally the time is a month or two, so calls usually take place pending successful Oxfords, and the cost is in the neighborhood of $350 which the congregation is responsible for.

Site Visit to the Candidate's Congregation

Once again, as soon as the in-person interview is over, the Committee meets and decides whether to continue the process with the candidate.

The candidate is simultaneously making the same decision. Discernment goes in both directions, and this is the first time the candidate has had a chance to really learn deeply about the congregation, its ministry, its location, what it feels like to be there. It's always sad, but sometimes necessary, when a good candidate makes their own decision not to continue.

If the answer from both Committee and candidate is yes, then the next step is for two or three members of the Committee to visit the candidate's current congregation. The visit is arranged in consultation with the candidate; surprise visits are never appropriate.

> If restrictions on travel or on gatherings make a site visit impracticable, we would also consult with the candidate about how to structure an alternative to allow the Committee to gain the same sorts of information a site visit would have provided.

During the visit, the team members should plan to attend worship, meet with the candidate if desired, and interview lay leaders designated by the candidate. The purpose of the visit is to see whether the candidate's actual ministry aligns with the candidate's self-description, and how that ministry is experienced by those currently working alongside the candidate.

This is a sensitive time for candidates. The Committee will need to negotiate with the candidate about how best to preserve confidentiality: most candidates will not be prepared to have their entire congregations know that they are considering a new call, yet it is important for the visiting team to be able to have candid conversations with people who have insight into the candidate's ministry. The Canon can advise if this presents a conundrum.

Phase 5: Making the Call

[If the Vestry is itself acting as the Discernment Committee, the recommendation process sort of collapses into itself, but the parts of this Phase belonging to the Vestry itself, including vote, Bishop's approval, and call, remain the same.]

After the site visit, the Committee meets and decides on one candidate[6] to recommend to the Vestry. The Committee chair notifies the senior warden, and together they call a special meeting of the Vestry, which all members of the Committee should also attend. The Committee chair should coordinate with the Canon to make sure that everything is in order, and that the Bishop will be available to consent to the call (or will delegate that consent to the Canon).

At the meeting, the Vestry reviews the entire process with Discernment Committee, satisfies itself that the Committee did its work thoroughly and prayerfully and that the Vestry understands the reasoning behind the recommendation, and then the Vestry elects the candidate as Rector or passes a motion to call the candidate as priest in charge, as the case may be. (In the event the Vestry does not accept the candidate presented by the Discernment Committee, the Vestry and Canon, with the advice of the Bishop, decide how to continue the process.)

The following steps happen in quick succession, often the same evening as the Vestry decision:

1. The Senior Warden telephones the Bishop (or Canon) to give notice of the selection and to ask consent.

2. The Bishop consents to the call.

3. The Senior Warden telephones the candidate to extend the call, and follows up with a hard-copy letter.

4. The priest accepts the call. This is actually a continuum that begins when the priest says "yes!" and concludes when the Letter of Agreement is signed. (In the event the priest does not ultimately accept the call, the Vestry, Discernment Committee, and Canon, with the advice of the Bishop, decide how to continue the process.)

5. The Discernment Committee Chair telephones other candidates to advise that they have not been chosen, thank them for their participation in the process, and offer blessings for their continued ministry, without naming the priest chosen. This should happen at the latest when the priest signs the Letter of Agreement (see below).

In the days after the priest says yes, the Senior Warden or other person delegated by the Vestry, and the new priest, prepare the Letter of Agreement. This Letter sets out compensation, time off, duties and expectations, and the relationship between priest and congregation. There are very complete templates available to help with this (see Appendix V for a sample), and the Canon is

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[6] Presenting only a single candidate is strongly recommended. If despite this the Vestry has charged the Committee with presenting more than one candidate, the Committee should consult with the Canon about how to do this.

available to advise and assist both the congregation and the priest as they work through the negotiations. Once the draft is complete the Canon approves it, with input from the Canon for Finance on compensation and other financial aspects. Finally it is signed by the priest, the Warden on behalf of the Congregation, and the Bishop and Canon.

Then—*but only then*—the veil of confidentiality lifts (with respect, only, to the priest who has been chosen), and the good news can go out about the new call! This should, of course, be coordinated with the new priest, who may have to announce their departure from one congregation even as they celebrate their call to a new one.

Finally, after the call is made, the letter signed, and the announcements sent, it's important to allow the new priest to spend a last few weeks focusing on the congregation they are leaving, so that they can say the same sort of good goodbye that we referred to in the very beginning, when the shoe was on the other foot.

~Hallelujah!~

May 2020

From the Bishop

Dear Colleagues in Ministry

A number of times during my first year among you, Canon Ambler and I have been asked about the rules concerning departing priests and former priests. I'm discovering that everyone sort of knows the gist, but people have very different ideas about the specifics. The church's practices are nowhere codified in written policy, so I thought it would be useful to share with you my expectations.[7]

Departing priests

One of the things I have quickly learned about the Diocese of Maine is how closely priests identify with and care for their congregations. That's a grace-filled thing and something I celebrate.

When a priest decides it's time to depart, a gap opens between priest and congregation. That can be painful, but it is necessary: it's a first step towards the coming goodbye. The priest needs to do their own discernment about what's next: retirement, a new call, a different sort of ministry. They don't have to do this discernment alone; they have the support of their Bishop and Canon, of spiritual directors, friends, and colleagues. Likewise the congregation has to do its discernment about what sort of life, work and ministry it is called to after the priest leaves. It doesn't do this work alone either: the congregation also has the support of Bishop and Canon, of supply clergy, of neighboring congregations, interim clergy in some cases, and more.

Just as the congregation does not have any role in determining the priest's life after the priest's last Sunday, so the departing priest has no part in decisions or discernment about the congregation's life after that day. In specific terms, that means that departing priests:

- Seek support from the bishop, diocesan staff, and other appropriate sources outside of the parish for ongoing processing and spiritual and mental health (i.e., spiritual director, therapist, peer clergy, etc.).
- Are absent from all discussions related to selecting their successor(s).
- Have no role in deciding the membership or guiding the work of any search or discernment committee.
- Refer vestry members to Canon Ambler who is available to consult with and support vestries as they enter into that work.

[7] This letter only concerns priests, not deacons (or bishops). Some of the considerations are likely to be the same, but until the question arises, I won't try to answer it.

- Refrain from suggesting clergy persons, or clergy styles to succeed them.
- Use discretion about planning events or obligations which will commit the parish after the priest is gone. It is helpful to leave routine matters planned and organized some little way into the future--it would be unkind, for instance, not to schedule worship leaders and do other normal business according to the normal patterns in the congregation. There may be some projects that the priest and congregation undertake together that will extend beyond the priest's farewell; such projects should have substantial congregational involvement and support. But the priest should avoid making special commitments that the congregation will have to carry out, and which might limit the congregation's ability to think new thoughts and do new things.
- Plan with lay leaders a liturgy to mark closure of relationships and the priest's departure. Consider inviting the bishop or the canon to the ordinary to participate in such a service using a service found in the *Book of Occasional Services*.
- Avoid being named rector, priest, or associate emeritus. The canons do not provide for such honorary titles, and this practice, besides being intrinsically confusing, does not promote a healthy separation
- Leave instructions on passwords, location of documents, rationale for procedures, and any other materials necessary for ongoing parish administration, including the parish's discretionary fund
- Notify local ecumenical groups or clergy associations of their leaving
- Resign from positions held in community organizations when the position is held by virtue of serving as priest of the parish

The purpose here is to recognize truth and to grant freedom. Recognize the truth that the priest and the congregation are parting ways, and must begin to travel separately. And grant each the freedom to see, separate from the relationship that is coming to a close, what God has in mind next.

Former priests

It is becoming more and more common for clergy to leave a congregation but continue to reside in the neighborhood. That happens often when priests retire: the priest owns a house in town, and there is no good reason to leave. Priests also often stay put because of their own non-church employment, or because of the needs of family.

Former rectors or priests in charge (for simplicity, let me just call them "former priests," even though they are still priests!) can be a blessing to a congregation. In time, they can choose to offer supply, support their successor, and contribute in a number of ways. Not all choose to, of course; some priests go on to other sorts of ministry, or prefer to worship in congregations that they didn't formerly lead.

But before any sort of new relationship can develop, there has to be time for the old one to really end. Congregations have to be allowed to say goodbye to their former priest and take new paths; and priests need to be allowed to say goodbye to their congregations and not get pulled back by a sense of obligation or guilt. After departure former priests:

- Nurture their worship and devotional life by attending other parishes
- Do not attend official parish functions, including worship
- Refrain from attending social functions that are attended mostly by former parishioners
- Refer any requests for pastoral or sacramental care from parishioners to the current priest or bishop
- Disengage from all parish-based social media platforms
- Disengage from all social media interactions with those affiliated with the parish
- Avoid discussions of concerns about the parish with parishioners, and refer these to the current priest
- Inform the current parish priest of conversations with former parishioners who seek pastoral care
- If retired, continue to attend clergy meetings and retreats, and participate in diocesan ministries, to the extent they choose.
- Do not return to the parish unless invited by the current parish priest in consultation with the bishop's office. An invitation may be made after the new priest has been in place for a full year, and not before.
    - This should be a conversation based in hospitality and prudence, not rights. The former priest has no right to return. But I hope clergy will be hospitable to their predecessors, and view them with holy hope as a source of support rather than of trouble.
    - I expect the former priest to honor any such hospitality by offering support and not trouble. The former priest should behave like a welcome guest: invited to participate, and exercising care to not be a problem for their successor. If these things are not possible, it's up to the former priest to withdraw quietly and graciously.
    - Former priests can certainly be invited occasionally to supply and otherwise serve in priestly roles, though it is probably wise in most cases for that only to happen gradually. What makes sense after five years might be premature after just one.

Families of former priests

The families of former priests are not obligated to leave the congregation. However, they must take care that their continued presence may be difficult both for them and the congregation. Part of what every congregation does after a priest leaves is to decide what they want to carry forward from the previous time, and what to leave behind. That can be a difficult conversation for the former priest's family to witness. Furthermore, a new priest may find the presence of their predecessor's family to be inhibiting. For that reason, I encourage (but cannot require) families of former priests to give the congregation some space during the transition.

A concluding word

Friends, what I've outlined matches the general practice of the church as I understand it, and reflects my expectations. In a community such as the Diocese of Maine, where our relationships are held with such high regard, I recognize that policies and guidelines about leave-taking will likely require local interpretation and application. Canon Ambler, particularly, but all of us at Loring House, are ready to help. If there are things here that trouble you or you wish not to live by, please schedule a conversation with me; I'd welcome you.

We all serve the same Lord, and we all want the best for the church. I hope having common understanding of these rules of the road will help us navigate the on ramps and off ramps, avoid accidents, and move together towards the heavenly city to which God calls us.

Almighty and everlasting God, from whom comes every good and perfect gift: Send down upon our clergy and upon the congregations committed to their charge, the healthful Spirit of your grace; and that we may truly please you, pour upon us the continued dew of your blessing. Grant this, O Lord, for the honor of our Advocate and Mediator, Jesus Christ. Amen.

Faithfully in Christ,
+Thomas J. Brown
Bishop of Maine

Appendix II: Selecting the Discernment Committee

The Discernment Committee (formerly known as the "Search Committee") is appointed by the Vestry, and is responsible for the process of discerning the priest who will bring the gifts and skills best suited to serve the Congregation's needs. This process will involve prayer, the preparation of the congregation's invitation materials, the review of written applications, participation in interviews, travel to visit candidates' home congregations, and lots of meeting time to discuss, evaluate, and make decisions.

The Discernment Committee works under a "Charge" from the Vestry: that is, a formal document that spells out the mission and duties of the Committee. The Vestry will specify (1) the details of the office which the Committee is seeking to fill, e.g., part time or full time; Rector or priest in charge for a number of years; (2) what the budget for the Committee will be; (3) how many candidates—generally one—the Committee should present to the Vestry; and (4) anything else the Vestry wants the Committee to include in its process. The Charge will also call the Committee and its members to maintain confidentiality about candidates, while communicating regularly about the progress of the process, and most importantly, will remind the Committee to pray regularly and share its prayer with the Congregation. A sample Charge is at Appendix II.

People become members of the Committee by appointment of the Vestry.

There are no hard and fast rules for how the Vestry should make its appointments. The suggestions that follow are general in nature; it's the job of the Vestry to adapt them as needed (in consultation with the Canon) to fit the personality and circumstances of the congregation.

In general, appointments to the Discernment Committee can be made as follows:

1. The Vestry should invite nominations to the Committee from members of the congregation. Nominations should be received in any form they are offered (such as in conversation); but the Vestry might consider creating a form asking the name of the nominee, the name of the nominator (self-nomination is fine); the reason the nominee is being nominated; and whether the nominee has indicated willingness to serve.
2. The Vestry should meet to review the nominations, and should add to the list members of the congregation that Vestry members believe should be considered.
3. The following categories of people should *not* be considered for membership:
    - Ordained people, whether Episcopalian or otherwise. They tend to develop undue influence on Discernment Committees, and may have strong but incomplete familiarity with some candidates.
    - Staff, or close family of staff (this of course includes the outgoing priest and family)
    - Close family of other Committee members.
4. The Vestry should choose four to six members of the congregation, plus one or two members of the Vestry, to serve on the Committee. Members should be chosen with the following values in mind:
    - Availability: The Committee will meet frequently—perhaps weekly at some points —over a period of many months. Committee members must be able to participate in those meetings; unless Zoom or other virtual presence is contemplated, someone who

will be away during the crucial period is not likely to be helpful even if they are otherwise perfect for the position.

- Skills: The Committee will be making delicate and subjective decisions affecting both the future of the congregation and the ministries of candidates. Committee members must be able to organize and keep track of large amounts of information, must be able to express, listen to and evaluate divergent viewpoints, and must be able to organize information and communicate effectively. People who do not work well with others will at best make the Committee's work much harder than it needs to be.
- Discretion: The Committee will learn information about candidates that is strictly and absolutely confidential, starting with the fact that any given candidate is searching. Members of the Committee may occasionally come under pressure from fellow-members of the congregation (or fellow-members of the Vestry, in the case of Vestry members on the Committee) to share information that should not be shared. Sharing confidential information violates both the trust of candidates, and the integrity of the process. The Diocese of Maine has experienced very few "failed" searches, but when we have had searches fail, it's because information got out where it should not have. Anyone who is not able to maintain confidentiality should not serve on the Committee.
- Representation: The makeup of the Committee should broadly reflect the makeup of the congregation.
    - What are the key "constituencies"? Choir, outreach, altar guild, youth…
    - In what ways is the congregation diverse? The Committee should reflect that diversity.
- The Vestry should choose a Chair, or two co-Chairs, of the Committee, who have particular gifts for organization, communication, and calm. The Senior Warden should communicate the name(s), together with contact information, to the Canon as soon as the appointments are made.

5. Once the Committee is constituted, the Vestry should prepare the "Charge" to the Committee, and the Committee should be commissioned for its ministry at a Sunday service. See Appendix III for a sample Charge.

Appendix III: Model Charge to the Discernment Committee

The Charge consists of the instructions that the Vestry gives the Discernment Committee for how it is to do its work (or, if the Vestry serves as the Committee, for how it will understand its own work in that role). This model is offered as a starting point for reflecting on the sorts of things that should be included. It is crucial that the Charge call for prayer, include provisions about communication and confidentiality, and specify the number of candidates the Committee is to present to the Vestry (it's both the strong recommendation and the nearly universal practice that one candidate be presented). The Vestry should charge the Committee, or commit itself, to:

1. Enter into a prayerful discernment process in accordance with diocesan policies.

2. Develop and publish a prayer to be used regularly by the Committee and congregation.

3. Determine rules for confidentiality and establish a covenant among the Committee members for maintaining discretion with respect to those matters that should remain within the Committee.

4. Complete the process within the budget allocated by the Vestry, or if additional funds are needed, request a budget adjustment before such additional funds are spent.

5. Complete the OTM questions and prepare transition-related material for the congregation web site, based on substantial input from and consultation with the congregation.

6. Communicate regularly with the congregation through the newsletter, bulletins and Sunday announcements.

7. In consultation with the Canon, establish a clear and consistent process for receiving applications, reviewing written materials, and interviewing candidates.

8. Determine a consistent decision making procedure, such as majority, unanimous, or by consensus (consensus is strongly recommended).

9. Prayerfully select one candidate to be presented to the Vestry. It is the Vestry who will elect and call the Rector or priest in charge.

10. Destroy all materials regarding candidates at the conclusion of this process.

Appendix IV: Budgeting for the Transition

Expenses arise at several predictable spots in the transition process. Some expenses are hard to forecast with confidence (for instance, how much it costs to bring a candidate to interview will depend on factors that can't be known at the outset, such as where the candidate is coming from, whether there are members of the candidate's household coming as well, and so forth). Others are more foreseeable, such as the cost of background checks. The following is meant to help the Vestry plan and budget a process that is financially manageable.

Ministry During the Interim

The cost of ministry during the transition period is, naturally, determined by the sort of ministry the congregation needs and arranges. Supply clergy rates for Sunday services are currently $150 (single service) or $200 (two services). Other liturgical or pastoral services are $85 per "unit" of time, that is, a morning, afternoon, or evening.

If the congregation calls an interim, either full or part time, it should expect to pay about the same as it would pay a Rector or priest in charge working the same amount.

Transition Consultation

The Canon's work with the vestry and the Discernment Committee is part of how we serve one another as a diocese—the congregation funds this ministry through its annual support of the diocese, and there is no further cost.

Preparing the Invitation

This is an area in which transition is much less expensive than it used to be. There is no cost to preparing the OTM Portfolio, and since information is published on-line rather than printed, the former cost of printing and mailing profile documents has vanished.

One thing that might cost money is refreshing the web site. The Director of Communications from the Bishop's office can offer good support for web site work at no charge, but if the congregation wants to do something elaborate, or have a professional manage the site, then that would be a cost for the congregation.

Another, and more likely, expense is that of transforming a free job listing with Episcopal News Service into a "featured" listing. Any congregation that hopes to attract the attention of clergy from beyond Maine should seriously consider this; costs are payable directly to ENS and are currently $199 for two weeks, $299 for a month, and $449 for two months.

Interviews

The first stage of interviews should not cost anything: video conference software is free, and the Diocese has a Zoom account that Committees are welcome to use. The only possible expense might be upgrading computer or related equipment, but it's usually possible to borrow anything that might be needed (including high-speed internet in places where it's hard to come by: local schools tend to be well wired and have been generous with sharing).

In-person interviews are, on the other hand, both essential[8] and potentially expensive. There's no way to make a good forecast; a solo candidate driving from a neighboring town, and a candidate family flying in from California, will result in completely different expenditures. However, the very expensive and the very inexpensive might, with luck, balance out, so a budget of $1000 per interview is probably reasonable. The number of in-person interviews will vary depending on the scale of the search and of the congregation; it would be wise to budget for at least three, and up to six in larger searches.

Travel to Candidates' Congregations

The same general observations apply. Figure each site visit at $1000 if two committee members are traveling together, and add $350 for each additional member going. The budget should anticipate at least two site visits.

Background Checks

Background checks cost about $350 each, with minor variation depending on where the candidate comes from and what steps are needed to check records in that jurisdiction. The Diocese arranges these checks, and congregations are responsible for the cost. We normally do no more than two checks in any given process.

Moving Expenses

The congregation is expected to pick up the priest's moving costs—which is fair, in that the priest is moving in order to come serve the congregation. This is negotiated and included in the Letter of Agreement. It's common for congregations to cap their contribution, agreeing to cover expenses up to a certain amount. Though there is no way to know at the outset what the move will entail, setting aside $4000 for those costs is reasonable.

[8] "Essential if possible" might be more apt for the time of the pandemic. An in person visit will always be most illuminating to both the candidate and the Committee; but if we need to find an alternative, we'll do everything we can to make it effective.

Appendix V: The Office of Transition Ministries (OTM) Narrative Questions

The Office of Transition Ministries (OTM) of The Episcopal Church offers a place for clergy who are searching for new positions to describe their gifts and skills, and congregations who are looking for new clergy to describe their offerings and needs. Each congregation, and each candidate, prepare a "Portfolio" which lists certain objective information—such as year of ordination for clergy, and number of members for congregations—and also includes short answers to questions designed to help clergy and congregations discern whether they might be a match for one another.

Every candidate will have a complete OTM Portfolio for eventual review by the Discernment Committee. Even before a candidate decides to apply—and often before he or she ever looks at the anything else about the congregation— they will be looking over the congregation's OTM Portfolio, deciding whether there is a possible call. So it's important that the congregation's Portfolio be both honest and inviting, and that it try to convey some of what makes the congregation the special place that it is.

Putting together the congregation's Portfolio is a team effort. The Canon will do most of the nuts-and-bolts work, filling in information about the details of the congregation and the position it is seeking to fill, and will send that information to the Committee for its review. The Committee will respond to the short-answer questions below, which parallel the short answers that appear on candidate Portfolios.

The OTM Party: Here's how the Committee can get direct information from the congregation, build trust and a sense of participation in the process, and do it all in two hours: The OTM Party! It's simple: the questions are circulated in advance, and everyone is invited to come to an extended coffee hour on a particular day. The Canon will be there to introduce the process and explain the questions, each of which will be present on a big sheet of newsprint. People circulate from question to question writing out their answers in a sentence or two, until everyone has had a chance to answer all the questions. The Committee then takes all the answers as the raw material from which it develops the congregation's answers to the OTM questions.

The short answers will end up being incorporated in a computer form, which is subject to some rigid requirements.

- Each answer can be **no longer than 1200 characters** (including spaces and punctuation). Please write your answers in a word processing program, and use the "inspector" or similar feature to count characters. If the entry is even one character too long, the on-line form won't accept it. God is merciful; the OTM computer is not.
- The answer to the last question can be no more than four entries, of one or two words each. A one word entry might be "kind". A two word entry might be "likes children". A three word entry might be "loves to preach", but it wouldn't be accepted.

- **All formatting** such as *italics* and **bolding,** or paragraph breaks, will disappear when the text is entered into the computer form; you have to convey meaning with the words themselves, not with their appearance or arrangement on the page. Each answer will appear on the finished OTM Portfolio as a single block of text.

Taken directly from the OTM Portfolio web site, here is the task: In 1200 or fewer characters each, please answer the following questions:

1. Describe a moment in your worshiping community's recent ministry which you recognize as one of success and fulfillment.

2. Describe your liturgical style & practice. If your community provides more than one type of worship, describe all.

3. How do you practice incorporating others in ministry?

4. As a worshiping community, how do you care for your spiritual, emotional, and physical well-being?

5. Describe your worshiping community's involvement in either the wider Church or geographic region.

6. How do you engage in pastoral care beyond your worshiping community?

7. Tell about a ministry your worshiping community has initiated in the past five years. Who can be contacted about this?

8. How are you preparing yourself for the Church of the future?

9. What is your practice of stewardship and how does it shape the life of your worshiping community?

10. What is your worshiping community's experience of conflict? And how have you addressed it?

11. What is your experience leading/addressing change in the church? When has it gone well? When has it gone poorly? And what did you learn?

12. In no more than four descriptors of one or two words each: Provide words describing the gifts and skills essential to the future leaders of your worshiping community. [Note—this was originally intended to allow people to do computer searches for specific attributes. It doesn't really work and nobody uses it that way. So try to find helpful ways of describing yourself but don't lose sleep over it!]

Please double check your word counts, make sure the answers are acceptable to the committee as a whole, and send the answers to the Canon, who will review them and make suggestions as appropriate. The congregation should have a chance to review the answers before the Canon publishes them on the OTM website.

Appendix VI: Sample Letter of Agreement with Rector serving full-time

For background information only. The Canon regularly updates model Letters of Agreement, and has a number of specific variants tailored to to different circumstances, so when it comes time to actually prepare a Letter for a new call, please check with the Canon.

LETTER OF AGREEMENT

Between

The Rev. __________________

and

the Wardens and Vestry of _________________
Episcopal Church in ________________ , Maine

The Vestry and Wardens of _______________ Episcopal Church in ________________ have called the Rev. _____________________ to serve as Rector, and the Bishop of Maine has consented to this call. This Letter constitutes the parties' agreement as to the nature and terms of the Rector's employment.

PURPOSE AND CONTEXT

______________________ Episcopal Church, acting through its Wardens and Vestry (the "Congregation"), and the Rev. ___________ ("the Rector") agree and recognize that the church is a community of the baptized, each member of which is given gifts by God for God's service and the service of God's people. The ministry of the church is to be the Body of Christ in the world, to carry out Christ's ministry of reconciliation, and to love one another and all the world as Christ loves us. The ministry of the Rector is to support, challenge and encourage the ministry of the whole congregation; to preach the Gospel and celebrate the sacraments; to serve young and old, rich and poor alike; and to take part in the councils of the congregation and the larger church, in communion with the Bishop.

EFFECTIVE DATE AND TERM

This Letter of Agreement shall become effective on the day all parties have signed, and remains in effect until modified in writing by mutual agreement of the Rector and Vestry. It is intended that the terms of this Agreement shall be reviewed and updated annually.

The relationship of Rector and Congregation shall continue indefinitely until terminated by mutual agreement of the Rector and Vestry, or in accordance with the procedures set forth in the canons of the Episcopal Diocese of Maine and of the The Episcopal Church.

SECTION A: START-UP MATTERS

The Congregation will reimburse the actual expenses of moving the members and goods of the Rector's household from ______________ to ______________, Maine, up to a maximum amount of $______.
All pay and benefits will begin on the _____ day of ______, 20__.
The Rector will begin work on the ____ day of ______, 20__

SECTION B – DUTIES, MUTUAL PROMISES, AND GOALS

The Rector is expected to plan and organize worship, in consultation with the Congregation; to preach and preside at worship; to preside at meetings of the Vestry or Bishop's Committee; to see to the proper administration of the Congregation's affairs in accordance with applicable canons, policies, and laws; to care for members of the Congregation at times of emergency; to offer pastoral care and counsel to the best of his or her abilities; to support members of the Congregation in discerning, developing and exercising their own ministries as baptized members of the Body of Christ; to participate in the life and leadership of the Diocese; and to live and serve in a manner faithful to the Rector's ordination vows and doctrine, discipline and worship of The Episcopal Church.

The Congregation and the Rector promise that each will use care, respect and diligence to support the ministry of the other, recognizing that the common purpose of all ministry is the glory of God and the care of God's people.

As reflected in the documents prepared by the Congregation in preparation for calling its new Rector, and as discussed during the process that led to this call, the Congregation and Rector jointly agree to direct special attention to the following goals and priorities, which shall be assessed and revised annually (including as part of the Mutual Study of Ministry, see Section E below):

1. ____

2. ____

3. ____

SECTION C – TIMES OF WORK AND LEAVE

1. The Rector's work includes both activities within the congregation and work on behalf of the community, the Diocese and the larger Church. The Rector is expected to work an average of ten to twelve units of work per week (a "unit" consists of the work done in a morning, afternoon, or evening), with specific weekly schedules depending on the varying demands of ministry. In general, no more than three evenings per week are expected. The Rector is expected to take two

days off per week, one of which will be a Sabbath of at least twenty four consecutive hours set aside solely for personal and family use (barring pastoral or other emergency).

2. The Rector will take the following periods of leave at full compensation:

a. National holidays, taken at the Rector's discretion so as not to interfere with worship or major religious festivals.
b. Annual vacation of four weeks, including Sundays, plus two days, accrued as follows: two days at the beginning of employment and each annual anniversary date thereof, and one week per quarter.
c. Parental leave after the birth or adoption of a child as provided by Canon 22, Section 4(4) of the Diocese of Maine.
d. Education leave not to exceed ten days per year.
e. Sabbatical leave equal to that provided by Canon 22, Sec 4(2) of the Diocese of Maine.

Unused leave time of any kind other than Sabbatical leave will not be carried over to the following year, except that up to one week of vacation time may be carried over from year to year. Unused leave time is not compensated at the end of the Rector's employment, except for vacation time accrued and unused.

3. When demands of the Rector's duties, such as pastoral emergencies or holiday services, prevent the Rector from taking scheduled time off, the Rector will take compensatory time off as soon as possible.

SECTION D – COMPENSATION, BENEFITS & EXPENSES

The Vestry will provide the Rector with:

1. Total Clergy Compensation of $__________ , to be paid in equal installments, made up of the following components:

a. An annualized cash stipend of $__________.
b. An annualized allowance of $___________ for housing and utilities; and the Vestry shall adopt annually a resolution specifying such amount to be a Parsonage Allowance within the meaning of §107 of the Internal Revenue Code of 1986 (as amended).
c. A cash payment equal to one-half the amount of the Rector's self-employment tax, to wit: $__________ .

2. Unless the Rector is retired, payment on the Rector's behalf of pension assessments to the Church Pension Group in the amount required by canon (currently 18% of Total Clergy Compensation).

3. Reimbursement of expenses pertaining to continuing education up to $750 per year.

4. Health, dental and life insurance as specified by Canon 22, section 2(2) (regarding insurance benefits) and section 3 if applicable (regarding proration of benefits for part time employment) of the Canons of the Diocese of Maine, as in effect as of the effective date of this Letter of Agreement and as may be subsequently amended by action of the Convention of the Diocese of Maine.

5. Reimbursement of out of pocket expenses, including mileage reimbursement at the rate determined by the IRS, in accordance with an Accountable Reimbursement Plan adopted by the vestry, up to a maximum annual amount of $__________.

The Vestry will maintain worker's Compensation and Employers' Liability Insurance coverage as required by Maine law. The Vestry will provide the Rector with a W-2 statement annually no later than the end of January, as required by Internal Revenue regulations.

The Rector will not charge fees for performing any rites of the Church for active members of the congregation.

If on account of illness or disability the Rector receives income replacement benefits such as those administered by the Church Pension Group as part of the pension plan, the Rector's Total Clergy Compensation will be reduced by a like amount; but the Vestry will otherwise continue to pay the Rector's salary and benefits (including full pension assessments).

SECTION E – FRESH START; MUTUAL STUDY OF MINISTRY

The Rector shall participate in monthly meetings of the Diocesan Fresh Start program for clergy in new cures, beginning as soon as practicable after the Rector's arrival.

Between eighteen months and two years after the beginning of the Rector's ministry with the Congregation, the Rector and Congregation shall conduct a Mutual Study of Ministry (MSM), for the purpose of assessing strengths and areas needing attention in the ministry they share, assessing progress towards previously stated goals, establishing new or renewed goals, and clarifying expectations of all parties. This first MSM will be facilitated by the Canon to the Ordinary, or other member of the Bishop's staff.

Further MSMs, or similar structured reviews of the Rector's and the Congregation's shared ministry, will take place no less than every two years thereafter, and will be facilitated by a person outside the Congregation chosen by the Rector and Vestry.

SECTION F –DISCRETIONARY FUND

A Discretionary Fund is to be established in the name and under the tax number of the Congregation, for the Rector's use in addressing the needs of the poor in the Congregation and the community. The Fund will be under the Rector's sole control, and the Rector may in his or her discretion authorize other persons to assist in the administration of the Fund. The Rector may not borrow from the Fund, nor use money from the Fund for personal purposes or for the benefit of any member of his or her household.

The Vestry shall provide funding for the Discretionary Fund as follows: ____________________. In addition, the Fund may receive gifts from members of the congregation, members of the community, and others.

The identity of recipients of grants from the Fund is to be kept confidential, but the Rector shall report at least annually to the Vestry on the general nature and activity of the Fund. The Discretionary Fund will be part of the annual audit in accordance with Canon 18, Section 1(5) of the Canons of the Diocese of Maine, which provides for the protection of confidentiality.

SECTION G – USE OF BUILDINGS

The Rector shall at all times be entitled to the use and control of all buildings and furnishings belonging to the congregation, as specified in Canon III.5(a)(2) of the General Convention of The Episcopal Church. The Rector will be guided in the exercise of such control by the advice of the Vestry, and by any policies regarding building use that may be adopted by the Vestry, Facilities Committee, or other appropriate body.

SECTION H – INTERPRETATION AND ENFORCEMENT

This Agreement is subject to the canons of the Episcopal Diocese of Maine and of The Episcopal Church, which shall control over this Agreement in any case of inconsistency. In case of disagreement concerning any aspect of this Agreement, the Rector and the Vestry agree first to seek the assistance of a mediator acceptable to both, or suggested by the Bishop. In the event a mediated resolution is not reached, the Bishop of Maine shall have final authority as to the interpretation and application of this Agreement, and the Bishop will not be required to consider any agreements not reflected in writing (such as unwritten "side deals"). This Agreement is entirely an ecclesiastical document and is not subject to interpretation or enforcement by any secular authority, including any secular court.

[Signature lines for Congregation (by its Senior Warden), Priest, Canon, and Bishop]