



The Search Process in the Diocese of Oklahoma

A Guide for Vestries, Search Committees, Interims/Priests-in-Charge

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Searching for your next Priest involves knowing the difference between **assessing skills** and **discerning calls**. We begin with the Bible...

The “Matthias Story” (Acts 1: 21-28) records the process of first transition of leadership in the New Church. It is a most valuable path because it works.

'May another take his place of leadership.' Therefore it is necessary to choose one of the men who have been with us the whole time the Lord Jesus went in and out among us, beginning from John's baptism to the time when Jesus was taken up from us. For one of these must become a witness with us of his resurrection." So they proposed two men: Joseph called Barsabbas (also known as Justus) and Matthias. Then they prayed, "Lord, you know everyone's heart. Show us which of these two you have chosen to take over this apostolic ministry, which Judas left to go where he belongs." Then they cast lots, and the lot fell to Matthias; so he was added to the eleven apostles."

In *Assessing Skills and Discerning Calls*, the Rev. Robert Voyle applies this story to transitions in the Church today. The story easily divides into practical steps:

- Naming the Need (Bishop/Staff meets with Vestry)
- Gathering the community of faith (Cottage Meetings, Surveys, etc.)
- Stating the criteria (Congregation Profile)
- Dividing the labor:
 - Assessing skills (Search Committee)
 - Discerning calls (Vestry)
- Prayer (All parties/All the time!)
- Final discernment (Vestry, Called priest, Bishop's Consent to the call)

This guide is adapted from Rob's thought-provoking work as well as substantial contributions from the Rev. Tom Orzo of the Diocese of New York. Thank you both for your dedication and permission to adapt your work.

The Rev. Eric S. Cooter, Canon to the Ordinary

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Terms Frequently Used

APPLICANT: A priest who has either self-nominated or has been nominated by someone else to enter into a search process, and has provided the Canon to the Ordinary with the requested application materials.

BACKGROUND CHECKS: Background checks are conducted through a commercial provider and paid for by Diocesan House on each of the final candidates. Each background check takes approximately 1 - 2 weeks to complete. The check includes credit for employment purposes, driving record, educational credentials, offender's registries, and criminal arrest record. Results are the property of the Diocese and must not be shared with the Vestry and/or Search Committee.

CANDIDATE: A qualified, referenced priest who has indicated interest in the diocese or the parish.

DIOCESAN OFFICE: The administrative office of the Bishop.

CANON TO THE ORDINARY (CTO): The CTO for this Diocese is The Rev. Canon Eric Cooter, whose responsibilities include:

- Provide Vestry with an overview of the search process
- Provide Vestry with candidates for interim pastor
- Maintains a file of priests seeking new positions
- Conducts preliminary reference checks on prospective candidates
- Supervises Interim Ministry Training Program
- Remains available to each congregation in transition through Wardens, Search Chair, Interim Pastor throughout the entire search process
- Meet with Vestry and Search Committee to organize and plan the search process; establish guidelines for search committee
- Assist in design of the self-study
- Facilitate various activities and parish meetings
- Meet with search committee to review, analyze and interpret data
- Assist in completion of congregation's profile
- Assist in completion of OTM Position Profile
- Conduct workshops in interviewing skills
- Provide on-going support and consultation to the Vestry as requested

FINAL LIST OF CANDIDATES: The top candidates (2-3 in most cases) as assessed by the Search Committee for handover to the Vestry. Search Committee must contact Diocesan House for a background check and "Bishop to Bishop" reference prior to hand off to vestry. The Final List is presented to the Vestry for discernment.

FRESH START is a program for clergy in transition. It is expected that all clergy in transition and new clergy will participate per Letter of Agreement.

LETTER OF AGREEMENT: Letter that reflects the terms of a call to serve. Must be reviewed by the Bishop. Approved model Letters of Agreement are available from Diocesan House.

MUTUAL MINISTRY REVIEW: Mutual Ministry Review (MMR) is a time to reflect upon and analyze the ways in which the church, in its broadest sense, has accomplished (or not) its goals. The three or four hours set aside for an MMR provide a time to get to know each other better, for Vestry, other lay leaders and clergy to talk together about ways to improve their working relationships, to talk about how the various church activities and programs are meeting the needs of the church and its members, and to look at new ideas for ministry. An MMR is facilitated by a trained Diocesan Staff member and should be held within the first twelve months of a new call. An MMR should be held on an annual basis thereafter.

OFFICE OF TRANSITION MINISTRY (OTM): The office within the Episcopal Church Center responsible for maintaining and updating active “portfolios” of individuals and congregations. Includes:

- **OTM PERSONAL PORTFOLIO:** A searchable form completed by an individual seeking employment in the Episcopal Church. It identifies educational background, work history, skills and experience, etc. It may also contain links to social media of the individual’s choosing. Data on the Portfolio is “self-reported” and does not require the approval of any diocesan authority.
- **OTM COMMUNITY PORTFOLIO:** A searchable form completed by the Parish Vestry and the Search Committee that summarizes the needs and desires of the parish. The form is usually completed with the assistance of the Canon to the Ordinary who uploads to the OTM database.

OFFICIAL LIST OF CANDIDATES: After preliminary references are completed, the Bishop reviews the list of potential candidates. At that time, he may choose to add and /or delete. The revised list becomes the official list of candidates. Only persons whose names are on the list are to be interviewed, and names are not to be added once the list is approved. Names of candidates are confidential and should not be shared with anyone outside of the Search Committee.

PARISH PROFILE: A profile written at the conclusion of the self-study stage of the search process. The profile summarizes the congregation's assessment of who and what it is and what it needs to be in the future. In addition, the profile includes important information such as budget, statistics, buildings and grounds, worship, etc. The profile also includes a section specifically outlining the gifts, traits, and characteristics of the "Priest We Seek."

SEARCH COMMITTEE: Committee selected and charged by the Vestry for the purpose of assessing the skills of potential Candidates and recommending a Final List of Candidates. Responsibilities include:

- Interview and check references on candidates
- Communicate regularly with Vestry and congregation about the progress of the search
- Present suitable candidates to the Vestry

- Regular communications within the congregation and with the Diocese, especially about the status of the search.

The work of the Search Committee is accomplished once the Final List is delivered to the Vestry.

Clergy Titles and Definitions

ASSISTANT CLERGY: A priest selected by the Rector as approved by the Bishop, who serves under the authority and direction of the Rector. In many cases this is a full-time position in a large parish. This covers all non-canonical titles such as Associate, Associate Rector, Curate; an Assistant is expected to submit resignation to a new Rector, who determines the suitability of continued service.

ASSISTING CLERGY: A cleric selected by the Rector as approved by the Bishop who serves under the authority and direction of the Rector. Assisting Clergy are usually part-time, retired, and canonically resident in another diocese. Deacons are considered Assisting Clergy. Assisting clergy are expected to submit their resignation to the new Rector, who determines the suitability of continued service. Assisting clergy are not eligible to become Rector, Interim, Priest-in-Charge, Pastor, etc. Deacons are guided by the Diocesan Customary for Deacons.

INTERIM RECTOR: A priest trained in Interim ministry who leads the parish through the transition. The typical length of stay for an Interim is 3-12 months and renewable if necessary. An Interim serves according to a Letter of Agreement. The Interim is the “Rector in the Interim” with the rights and responsibilities normally accorded to the Rector with the exception of tenure. **NOTE: The Interim Priest MAY NOT be considered for nor called to serve as Rector, and should not be sought for opinions regarding candidates.**

PRIEST-IN-CHARGE (PIC): A priest retained to lead the parish for a term. A Priest-in-Charge has full authority of the Rector, except tenure, unless otherwise specified in a Letter of Agreement. A Priest-in-Charge **MAY** be called to serve as Rector, but should not be sought for opinions regarding candidates.

SUPPLY PRIEST: A priest retained on a short term or “per-diem” basis to officiate at liturgies and to provide pastoral care. A priest who supplies for a church that is in the search process cannot be eligible to become Rector.

RECTOR: A full-time priest elected by the Vestry with the Bishop's approval for the ordinary leadership of a Parish as described in the Canons of the Episcopal Church and the Diocese of Oklahoma. In order to call a Rector, the Parish must be in a position to support and sustain the position without outside financial assistance. The relationship between a Rector and congregation is protected by the Canons of the Church and is dissolved by mutual consent or by the dissolution of a pastoral relationship as provided for in the canons. This is protection sometimes referred to as “tenure” a non-canonical term.

VICAR: A priest, appointed by the Bishop, serving full-time or part-time, with charge and responsibility for a mission. The Bishop as Rector of all missions, usually seeks the council of the Bishop’s Committee when appointing a Vicar. A Vicar may be eligible to become Rector when the mission becomes a parish.

Getting Started:

- Rector/Vicar/Priest-in-Charge's announces departure. Process begins.
- Wardens notify the Bishop and Canon to the Ordinary of the effective date of the clerical opening.
- The Canon to the Ordinary and/or the Bishop will meet with the Vestry/Bishop's Committee the week following the Rector/Vicar/Priest-in-Charge's announcement. This meeting's purpose is to review the search process and assist the Vestry in planning the transition. ***Please do not form a Search Committee at this time.*** The major task of the parish at this time should be celebrating the ministry of the Rector.
- Senior Warden (or both Wardens) are encouraged to conduct an "Exit Interview" when appropriate. Questions might include the following. Add your own.
 - Apart from Sundays, what skill did you use most here?
 - What ministry skill would you have added?
 - Describe what was a typical week.
 - What big challenge will the new Interim face?
 - What big challenge is the Congregation facing?
 - What did you like most to do here? Least?
- The Vestry, working under the guidance of the Bishop and Canon to the Ordinary will begin a process to call an Interim Rector, Priest-In-Charge, or Long-Term Supply Priest if required or desired.

Essential Guidance for The Now "Former Rector/Vicar/Priest-in-Charge"

All Rector duties are terminated as of the effective date of retirement/resignation. This carries forward during the Transition, the time before the next Rector/Vicar arrives. The Parish needs time and space between Rectors/Vicars to discover who they are now, where they want to go in the future and with what new leadership.

During the Transition, the former Rector/Vicar **will not** officiate or assist at baptisms, weddings or funerals in the congregation. This will prevent divided loyalties in the congregation and pressures on the Vestry and/or the Interim Rector.

- The former Rector/Vicar may be invited to participate by the new Rector/Vicar once he/she in place.
- The former Rector/Vicar is not to be involved in the administration of the Parish.
- The Discretionary Fund is a fund of the Parish and must be transferred to the Parish.

Notes on Ethics and the Former Rector/Vicar/Priest-in-Charge

The following is adapted from a manual on transitional ministry of the Evangelical Lutheran Church in America (ELCA), Florida/Bahamas Synod and from remarks from Bishop Rogness of the Greater Milwaukee Synod, ELCA. It may be reproduced in Parish communications

This policy, the “Ethics of Transition”, regards the sensitive matter that arises when clergy are requested to perform liturgical/pastoral acts by people who are now former parishioners.

We begin by saying that there is no painless way out of an awkward situation. Often, a good pastoral relationship is also a personal relationship. Therefore, it is not uncommon for people planning a wedding, funeral, baptism, etc., to desire the presence of clergy who have been important in their lives. One can expect that those times come when one would want the liturgical/pastoral presence of a former rector, assistant priest or deacon in the times of special occasions.

Upon taking leave of the congregation, the former Rector/Vicar is no longer in a pastoral relationship with that congregation and its members. The current priest in charge (Interim, Rector, Priest-in-Charge, Pastor, etc.) is ordinarily expected to preside at all liturgical and pastoral functions of the parish.

At times the priest in charge may call on the former priest to participate in a liturgical/pastoral function. **In all cases, the responsibility belongs to those clergy who have taken leave of the congregation to make clear that the pastoral relationship has ended.**

Naturally, clergy want to do what they are trained to do, especially when people value our doing it; but as clergy who are accountable, it is of paramount importance that we do all we can to support the new pastoral relationship that is in place. Here are some helpful, specific responses that may be of assistance.

Former Rector/Vicar: *Respond, for example, by saying "It's simply not appropriate for me to do that. I'm not your priest anymore. I'm glad you consider me a friend. I'd love to come if invited, as your other friends do."*

It is not helpful to say, *"You'll have to talk to the new priest about that."* This is often said, perhaps thinking that such a response respects the new priest's role. It does not—it puts the new priest in the no-win situation of acceding to the parishioner's request and relinquishing the role to you. For the new priest to say "no" can result in his/her being perceived as cold, jealous, unresponsive and uncaring.

Simply say that it's not your role anymore.

Interims and new clergy: Speak as affirmatively as possible of the relationship your predecessor has had with parishioners, but don't relinquish your pastoral role. When you feel it's appropriate and healthy, invite the previous priest/deacon to participate in a secondary way. The pastoral role is yours.

Parishioners: Don't even ask. It puts all the clergy in a very awkward position. You affirm your former priest best by inviting him/her to attend a function while showing high regard for your new priest by seeking out that person to be your pastor. This is true even if a former priest lives down the block and the new one is someone you hardly know.

This may sound cold and legalistic, especially when one is going through a significant life event. It is not meant to be; it is meant to be pastoral in the best sense of the word. While we all encounter situations we regard as "exceptions", there are in fact few circumstances that prove to be exceptional.

This principal should also be applied to what might be called "gray areas" -- contact with the former priest over personal life struggles, complaints about parish life, etc. Clergy are well advised that our friends, our former congregations, and the Church be best served when we truly respect those pastoral boundaries by which we order our lives. Most clergy are very clear about these matters most of the time, but we are all human enough that an occasional reminder is good for all of us.

Notes on Staff and Assisting Clergy

The Bishop depends on the Vestry and Wardens to help manage the Parish when it is without a priest who is in charge (Rector, Interim, Priest-in-Charge, Pastor, etc.). During this time, the hiring and/or dismissal of lay staff must be done only as a last resort and then very carefully. The new priest will appreciate having some freedom to evaluate and form the staff for future needs.

The only staff positions that canonically end with the resignation or retirement of the Priest are those of ordained Assistants, regardless of title (Associate, Assistant, Assisting Priest, Retired Assist, Deacon, etc.). If the Vestry agrees that an Assistant may stay on through the transition, the Assistant should be given a reasonable time to seek another position after the new Priest arrives. In some instances, the Assistant has been able to remain and work harmoniously with the new Priest, but in most cases the ordained staff turns over within a year or two.

The Deacon takes no role in the search process.

The Work of Discernment Begins

“What about Sundays, now that the Rector/Vicar/Priest-in-Charge is gone?”

With assistance from the Bishop as well as that of the Canon to the Ordinary, the Senior Warden and Vestry must make arrangements for the conduct of worship and for pastoral care until an interim rector begins. Until there is an interim rector or priest-in-charge, the senior warden is the “ecclesiastical authority” of the parish and signs transfers, requests for licenses, and other documents normally signed by the clergy. This authority is administrative rather than pastoral. The Senior Warden will utilize the Diocesan Supply Clergy list and make arrangements for Sunday worship and other worship services as needed.

Options for the “Search Process”

“Rector/Vicar/Priest-in-Charge Search” and The Interim Period

When discussing the need for an Interim, it is helpful to consider some initial questions:

1. Has the former Rector served the parish for a long time?
2. Is the Vestry organized for the work that needs to be done?
3. Is there a history or a pattern of unproductive conflict?
4. Is there an emergency to manage?

NOTE: A “Yes” to any of these questions usually indicates a need for a skilled, trained Interim priest.

An **Interim Rector** or **Interim Vicar** will be selected to pastor the congregation during a search. This person is called by the vestry in consultation with the Bishop’s Office (who can provide candidates). This search generally gets underway soon after the priest announces that he or she is leaving.

The term “Interim Rector” is used for those clergy who come into a congregation for an agreed transition period and who by virtue of that role **are not** to be considered to become the rector or vicar. An Interim serves according to a Letter of Agreement. The Interim is the “Rector in the Interim” with the rights and responsibilities normally accorded to the Rector with the exception of tenure. Normally they have been trained and are experienced in the ministry of transition. The terms and conditions under which an interim rector is called may vary with local circumstances but generally the responsibilities include the conduct of public worship, the continuation of pastoral ministries, support of programs, and whatever else contributes to the maintenance of the normal parish program.

Of particular importance, the interim rector is trained to facilitate the developmental process of an interim period, 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, and other parish leaders.

The duties of an Interim Rector include presiding at meetings of the vestry and supervising, hiring and firing staff. Compensation must be comparable to that paid to the new Rector for comparable responsibilities. The appointment of an interim rector must be approved by the bishop since he or she is an extension of the bishop's ministry just as a rector or vicar is an extension of the bishop's ministry.

A **Priest-in-Charge** is a priest willing to serve for a term. The term is usually for a set period of time and may be shortened if mutually agreeable between the Vestry and the priest, the Bishop approving. As the parish budget requires, it may or may not be a full-time position.

The Vestry continues their canonical tasks while taking their place in the transition. The Interim (or the Priest-in-Charge) has the usual duties that pertain to the Rector. This includes chairing the Vestry meetings, supervising any assisting clergy, supervising staff while providing for the worship and pastoral necessities of the parish.

Self Study: Organizing for Labor

Before a Search Committee is established by the Vestry, there is much work to be done by the Vestry, well in advance of identifying, forming, and handing of a search to a Search Committee. The Vestry must create subcommittees of the Vestry to accomplish the following tasks first:

1. **Self-Study Subcommittee:** This committee is charged with developing a self-study of the congregation, which will include developing, distributing, and tabulating the responses from a congregation-wide survey, which should be designed to solicit input, feedback, and participation from the entire congregation in the search process. The survey answers questions such as: Who are we? What is our purpose? What is important to us as the people of God in this community? What are our dreams for the future? **AND what are the leadership, pastoral care, preaching, and other qualities we seek in our next priest?**

This committee may also work with the Vestry and Canon to the Ordinary to plan, facilitate, and support a congregational workshop to explore these questions further. Sample surveys can be found in the “self-study resources” section of this Manual and from the Diocesan Transition Minister. Adapt the survey as is necessary for your particular situation. *The survey should not be limited to “official” members of the parish, rather, it should include anyone who has an interest.* The results of the survey should be published as soon as possible and should be available to anyone in the parish community. The use of paper as well as electronic survey media such as “Survey Monkey” is encouraged for maximum participation.

2. **Congregational Profile Subcommittee.** This committee utilizes several resources (survey, meetings, conversations) to develop the primary marketing document which will be used in the search process to attract candidates for the position. PARISH PROFILE and OFFICE of TRANSITION MINISTRY PORTFOLIO are published through multiple national and regional transition search sites and they become the primary advertisements used to develop a qualified candidate pool. The Canon to the Ordinary will assist this committee as they develop this essential search document.
3. **Website Subcommittee:** The congregation's website is one of the first places interested clergy will visit when considering a call. This committee will review the website from the perspective of an interested candidate and create a landing page for all application materials associated with the search. *Please work with the Canon to the Ordinary and Ms. Susanna Lemasters, Diocesan Communications Director for guidance or support with this project.*
4. **Clergy Compensation Subcommittee.** Clergy Compensation is a complex issue, mostly due to the unique status that Clergy have under the Internal Revenue Service Tax Code. The early stages of a search is the best time to begin developing a compensation package that is sustainable within the existing budget, and competitive within the norms of the church. It is

essential that the congregation develop a REALISTIC compensation package that can be funded by the operations budget without depleting endowments, and with a commitment of at a minimum of 3 - 5 years. The Diocesan CFO is very knowledgeable in all aspects of clergy compensation and **should be consulted early in this process to ensure that a sustainable compensation package can be developed.**

5. **WORK GATHERING:** As the Vestry's subcommittee work comes to a close, all the information is gathered and delivered to the Vestry who may wish to set aside some specific time in order to reflect, pray, evaluate the marketing materials, and the compensation plan. The Survey, Clergy Compensation Report, all other data goes to Senior Warden, who manages the gathering and makes sure that all materials are available. The gathering may be facilitated by the Senior Warden or designee (also may include support from the Diocesan Transition Minister).
6. **Forming a Search Committee.:** It is essential to identify Search Committee members who represent the variety of constituent groups (age diversity, ethnic diversity, length of membership, active leadership, in the congregation, etc.) The Search Committee members should primarily be people of prayer who possess the gifts of discernment. After the Search Committee is formed, the vestry will need to develop a clear "Charge" for the work of the Search Committee. This charge includes the number of final candidates the committee is to submit to the Vestry, as well as a deadline for that submission. **NOTE: the Vestry has the canonical authority to call the next Rector (with Bishop's Consent). The Bishop appoints Vicars and Priests-in-Charge.**

Sample Charge from the Vestry to the Search Committee:

We, the Vestry of _____, desiring to call an Rector, do hereby delegate to our Search Committee the task of recommending a Candidate (or Candidates) to the Vestry

We hereby charge to the Search Committee:

- *The Committee consists of only those so-named by the Vestry.*
- *There shall be (1,2,3,4, ???) ____ final candidates presented to the Vestry (recommend at least 3)*
- *CONFIDENTIALITY regarding candidates will be maintained throughout the search process.*
- *At least (1 -2) vestry representatives will serve as liaison members of the Search Committee*
- *Candidates will be presented to the Vestry no later than dd/mm/yyyy*
- *The Committee shall conduct the search within the Vestry-approved budget*
- *The Self-Study materials will form the basis of the criteria*
- *The Committee will regularly communicate with the congregation as to the status of the search*
- *The Committee will reveal the names of Candidates only to the Vestry*
- *Once the Call is issued and accepted, the Committee will take an active role in assisting the new priest and his or her family as they settle into the community*
- *If these criteria cannot be met, the Vestry may reorganize or dissolve the Search Committee.*

Calling the Search Committee

1. *Contact Search Committee Candidates.* The Senior Warden usually contacts the Search Committee Candidates by phone beginning the day after the Vestry gathering. Remember to tell each Candidate the Mandate that will be given to the Search Committee. Members of the Search Committee should have their own copy of *the finished product of each of the four subcommittees*.
2. *Confirm findings with the Congregation.* In some congregations, this takes on the character of a celebration. This often takes place at the Sunday morning Coffee Hour. The newsprint used for the vestry gathering is sometimes saved and displayed so that people can see the process at work. Other displays record the information that has been gathered up to this point.

The Search Committee/Vestry “Handoff” Meeting

The purpose of this meeting is to hand-off the day-to-day responsibility for the search process from the Vestry to the Search Committee and is normally facilitated by the Canon to the Ordinary. It is not necessary for the entire Vestry to be present—rather, the Senior Warden represents the Vestry at this meeting. It is a time to review the Search Committee charge, and resolve any questions and let the Search Committee begin its work.

The Search Committee Work Begins

How do we acquire candidates?

1. **National and Regional Advertising:** The Canon to the Ordinary will utilize several networks to advertise the position throughout the Episcopal Church (Province IV Transition Officers network, Office of Transition Ministry, Episcopal News Service, Gathering of Leaders, Diocesan Website, etc.) For a small fee paid to *Episcopal News Service*, the congregation is able to obtain better placement of their position advertisement, which is becoming a primary source for job listings in the Episcopal Church.
2. **The Congregation will want to submit names:** Members of the congregation will be eager to recommend potential candidates. The Search Committee should encourage this. It is suggested that members contact potential nominees and encourage them to send their materials directly to the Canon to the Ordinary and not the Search Committee. The member should notify the Search Committee Chair that their nominee has shown interest and will be contacting the Diocesan Transition Minister.
3. **Clergy will refer themselves directly to you:** Surely, interested priests will contact the Search Committee directly or through the parish website. It is important for such names to be forwarded to the Canon to the Ordinary as soon as they are received, as we do not want to unnecessarily delay the process by circumventing the diocesan referencing process.
4. **The Diocese will want to submit names:** The Bishop's office will want to make their own recommendations as we have an active file of priests, both within and outside the Diocese of Oklahoma who are looking for new positions.
5. **The Episcopal Church:** When the Vestry completed the OTM Portfolio, it became part of a searchable database that may be accessed by all interest clergy in the Church.
6. **Other sources** may include advertisements, the "rumor mill", etc.

Receipt of Application and Initial Reference Checks – Diocesan Office

It is important that all applications come through the Canon to the Ordinary's office first. As the Bishop has a responsibility to oversee and safeguard the process, an initial reference check by the Canon to the Ordinary must take place in order for any candidate to proceed. These reference checks are usually between the Canons of the two dioceses involved, and there will be later in the process a "bishop-to-bishop" reference. The reference check generally pertains to the candidate's fitness for ministry. It is ascertained that the candidate is in "good standing" with their home diocese and that there are no disciplinary or pastoral issues that would preclude the candidate's service.

NOTE: It may come to pass that not all the candidates submitted will be returned back to the Search Committee and that Diocesan House will not be in a position to disclose the reason(s) why.

The Bishop will review this list and may make additions and/or deletions. This approved list becomes the official list of candidates. Names of candidates are confidential and should not be shared with anyone outside of the Search Committee. The Canon to the Ordinary will meet with the Search Committee to "hand off" the approved candidate list.

The Search Committee's Work Begins.

The process usually takes the following shape, infused with humility and prayer:

1. Assess the Candidates:

- a. Review All Candidate Materials: *Please avoid thinning the list at this point!*
- b. You may want to consider sending specific questions to the candidates to assess how they communicate in writing. Questions should be about four in number and related to the values found in the self-study.
- c. Personal Reference checks (please do not contact Diocesan Office references – duplication)
- d. Review social media (Facebook, blogs, Twitter, online sermons, etc.)
- e. Conduct Skype or Telephone Interviews.
- f. Begin initial assessments and narrowing the candidate pool.
- g. Visits to applicants' congregations for confidential review may be conducted, once the list has been thinned to just a few final candidates.

2. Selection of the Candidates to hand over to the Vestry for Final Interview:

- a. When the Search Committee determines the final candidates and are ready to handoff the names to the vestry, the Canon to the Ordinary is to be notified right away.
- b. The Bishop will conduct a final "bishop-to-bishop" reference check.
- c. A formal background check is completed (and paid for) by Diocesan House (may take up to two weeks). **NOTE: The background check is the property of the Diocese and may not be disclosed.**
- d. Once the Background Check and "Bishop to Bishop" checks are complete, the Search Committee can then submit final candidates to the Vestry.

3. SEARCH COMMITTEE makes its final candidate recommendation to the Vestry.

Once cleared, the final candidates may be submitted to the vestry and a joint Search Committee/Vestry meeting facilitated by the Canon to the Ordinary will be held.

The Vestry's work continues

1. Vestry invites final candidates and spouse/family to *visit the parish for an interview* with the Vestry.

It is suggested that this visit include:

- a. Day 1: An informal meeting with the candidate and spouse over dinner, and possibly at a parishioner's home.
- b. Day 2: A formal interview with the Vestry at the church.
- c. Day 2: The Vestry should make arrangements for the candidate to tour the city and review housing options during this visit.
- d. NOTE: If a candidate resides outside the Diocese of Oklahoma, plans for the visit must include an interview with the Bishop during this visit. This visit can be coordinated through Ms. Lesli Graft, Executive Assistant to the Bishop lgraft@epiok.org.
- e.

CONFIDENTIALITY NOTE: Candidates should not be asked to preach, celebrate, or meet with the general membership of the congregation, nor should they be identified as a candidate for the open position during their visit to the congregation.

2. The Vestry Call and Decision

- a. After the final interviews, the Vestry will meet to prayerfully deliberate and discuss their impressions of the final candidate's visit.
- b. The Vestry should then vote to elect the new Rector, being sure to record this action in the Vestry minutes in the form of a resolution and recorded vote.
- c. The Wardens will then notify the Bishop and Canon to the Ordinary (in writing) of the Vestry's choice of their next Rector or Priest-in-Charge, and request in writing the Bishop's consent of the call (canonical requirement) **NOTE: No priest may serve in a congregation of this diocese without the Bishop's consent.**

NEXT STEPS

1. Letter of Agreement (LOA)

- a. The Canon to the Ordinary provides the Vestry with an approved LOA Boilerplate.
- b. Vestry negotiates the terms of the call (Compensation, benefits, relocation, etc.) and sends the DRAFT LOA to the Canon to the Ordinary for approval.
- c. Please have three (3) copies signed (original signatures) by the Rector/Vicar-Elect and the Wardens on behalf of the Vestry and Parish. All three originals are to be mailed to the Bishop for his signature. The Diocese returns two remaining copies to the Rector/Vicar-elect and congregation respectively.

2. FINAL STEPS

- a. Search Committee advises all nominees not previously advised that they are no longer under consideration, and thanks them for their participation in the process.
- b. Vestry in coordination with the Bishop's office makes plans to celebrate the ministry of the new Rector/Vicar.
- c. The Bishop and Rector-Elect agree upon a date and time for the Celebration of a New Ministry (Institution and Induction). The Installation/Induction formally invests the Rector-Elect as Rector. As it is a celebration of the larger community, it needs to be held at a time when those outside the Parish can attend.

3. MAKING THE BIG ANNOUNCEMENT

- a. Have a press release on hand (preferably with photographs) for release to the local media and the Diocese. You may call the Diocesan Director of Communications for assistance.
- b. The first announcement should be made orally to both the priests former and the new congregations and should take place on the same Sunday.

NOTE: A summary “STEP by STEP” guide to this process is available on pages 51 – 56 of this manual. It may be helpful to utilize this guide for “quick reference” as the work progresses.

The New Relationship Begins

Roles, Responsibilities and Expectations: Rector

The most effective ministry happens when there is clarity about the division of responsibilities between priest and parish leaders. It is helpful when priest and Vestry members agree to identify, discuss together, and state in writing the expectations and responsibilities of each. Specifics for the priest generally include the following, subject to church canons.

1. ADMINISTRATION:

- a. Participate with the Vestry in long-range planning, annual evaluation, and goal setting for the congregation.
- b. Hire, supervision of, and if necessary terminate other salaried or non-salaried people in the parish, in consultation with the Vestry.
- c. Provide support and resources for the planning and execution of the stewardship education program and fund raising activities of the congregation.
- d. Be informed about and actively engaged in the Vestry's fiscal responsibility and oversight for the physical and financial resources of the parish.
- e. Participate with the Vestry in an annual Mutual Study of Ministry.

2. WORSHIP:

- a. Plan and execute all liturgies and special services.
- b. Supervise the music program and make final decisions on music used for services.

3. LEADERSHIP:

- a. Preside at the annual meeting of the congregation as well as at the monthly meetings of the Vestry.
- b. Serve in the community and represent the interests of the parish to the community.
- c. Serve on regional and diocesan committees when asked, and along with the lay delegates, to represent the parish at Deanery Convocations, Diocesan Convention, etc.

4. PROGRAM:

- a. Ensure the offering of regularly scheduled programs of Christian education, formation, and spiritual growth for children and adults.
- b. Be a preacher and teacher of the Gospel.
- c. Support the social and outreach activities of the parish.
- d. Make decisions regarding the use of buildings and grounds.

5. PASTORAL CARE:

- a. Be a pastor to members and others in need.
- b. Identify and raise up lay ministry, encouraging all to recognize and offer their gifts.

6. PERSONAL:

- a. Take sufficient time off each week for refreshment, recreation and healthy personal and family life.
- b. Advance his or her personal growth and spiritual development by participating in Bible study, prayer groups, retreats, or continuing education programs.

Expectations and Responsibilities: Vestry

The most effective ministry happens when there is clarity about the division of responsibilities between priest and parish leaders. It is helpful when priest and Vestry members agree to identify, discuss together, and state in writing the expectations and responsibilities of each. Specifics for the Vestry generally include the following, subject to church canons.

1. ADMINISTRATION:

- a. Participate in long-range planning, annual evaluation, and parish goal setting.
- b. Approve and fund all staff positions.
- c. Plan and execute, with the priest's guidance, the stewardship education program and fund raising activities of the congregation.
- d. Exercise fiscal responsibility and oversight for the physical and financial resources of the parish.
- e. Search for new clergy leadership when necessary.
- f. Participate with the priest in a Mutual Study of Ministry.

2. LEADERSHIP:

- a. Participate responsibly in the deliberations of the Vestry meetings by communicating ideas, opinions, and concerns as well as enthusiasm and support.
- b. Share in the leadership of the congregation by serving on or chairing committees as needed or requested.
- c. Provide leadership in marshaling congregational support for programs and ministry established by the priest and Vestry.

3. PROGRAM:

- a. Initiate, coordinate and support the social and outreach activities of the congregation.
- b. Advance personal growth and spiritual development by participating in Bible study, prayer groups, retreats, or Christian education programs.

- 4. **PERSONAL:** Take sufficient time off each week for refreshment, recreation and healthy personal and family life.

Samples, Models, Resources

Sample Liturgy for Welcoming an Interim Rector/Priest-in-Charge

NOTE: *This liturgy is different from the "Celebration of New Ministry" used to welcome and install a Rector/Vicar.*

May be reproduced for the service bulletin. The service should take place as part of the Sunday Eucharist. After the Processional Hymn, the Wardens gather with the Bishop (or the Bishop's Deputy) in view of all.

Leader: Beloved in Christ: A church community is always in change. We gather here in the presence of God to welcome the Rev. _____ as Interim Rector/Priest-in-Charge of _____ Church.

Leader: (To the Interim) _____, Priest in the Church of God, in the presence of God and this community, will you commit yourself to this new trust and responsibility, and promise to discharge your duties according to the Canons of the Church and the by-laws of this parish?

Interim: I will, with God's help.

Leader: Will you love, serve and pray for these people, nourishing them with the Word of God and His Holy Sacraments and lead them forward during this important time of change?

Interim: I will, with God's help.

Leader: Will you lead this congregation in giving faithful witness to their Baptismal promises, making known the love of God through loving service among themselves and this community?

Interim: I will, with God's help.

Leader: May Almighty God, who has given you the will to do these things, give you the power to perform them.

People: AMEN.

Sr. Warden: I ask all of you now, people of this congregation: Will you receive _____ Priest of the Church, who continues the work of a priest among us? Will you regard him as a fellow servant of Christ and work with him in the interim ministry that is before us?

People: We will, with God's help.

Jr. Warden: Will you pray for him and honor him for his work's sake and in all things strive to live together in the peace and unity of Christ?

People: We will, with God's help.

Leader: By virtue of the commitments made in this place, we welcome _____ as Interim Rector of this congregation, in the name of the Father, and of the Son, and of the Holy Spirit.

ALL: AMEN. *Applause is appropriate. The service continues with the usual opening for the Holy Eucharist. In the absence of the Bishop, the new Interim Rector/Priest-in-Charge is Celebrant*

Sample Liturgy for Commissioning the Search Committee

May be reproduced for the service bulletin. This usually occurs following the homily (and Creed) at the Eucharist. The congregation being seated, the celebrant stands in full view of the people. The sponsors and candidates stand facing the celebrant, who says these or similar words:

Brothers and Sisters in Christ Jesus, 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 Wardens: 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 his Church?

Warden(s): I believe they are.

The Celebrant says these or similar words to the candidates for the Search Committee: You have been called to a ministry in this congregation. Will you as long as you are engaged in this work, perform it with diligence?

Candidates: I will.

Celebrant: Will you faithfully and reverently execute the duties of you ministry to the honor of God, and the benefit of the members of this congregation?

Candidates: I will.

THE COMMISSIONING

Warden(s):

I (we) present to you these persons to be admitted to the ministry of the Search Committee.

Celebrant : Let us Pray. O 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 counsels, 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 in this Parish. *Applause is appropriate. The service continues with the usual opening for the Holy Eucharist.*

Spiritual Resources

Bible Study

The interim time is a time when a congregation is especially active in seeking God's will for the Christian community. Bible study and prayer are the primary resources for this discernment process. Here is a method of Bible study that allows everyone to participate and where responsibility for preparation can easily rotate. It is often useful to use the lessons for the previous Sunday. Some additional passages, which are especially relevant to the search process, are also listed for your use.

Bible Study Model

- 1) The passage is read aloud. Quietly listen or read along.
- 2) Each person in the group is asked to relate what word or phrase from the reading struck a chord. No comment is allowed. Merely share the word or phrase.
- 3) The passage is read aloud again. If possible, just close your eyes and listen to the words. Let your imagination work.
- 4) The group enters into discussion. What is the passage saying to you right now in terms of the search process?
- 5) The leader closes with a prayer.

Suggested Scripture Readings

Isaiah 40:1 - 11 *Comfort, comfort my people*

Genesis 50:1 - 10, 14 *Death and mourning of Jacob by Joseph*

Exodus 3:1 - 12 *Moses and the burning bush*

Exodus 17:1 - 7 (or Exodus 13:17-18 and Numbers 11:1-2, 4) *Israelites complaining to Moses that God had deserted them*

Joel 2:28 - 32 *God will pour out spirit on all flesh; all shall see the vision of God*

Philippians 1:29 - 2:13 *Christ's self-emptying and its implications for congregations*

Romans 8:18 - 25 *God works subtly but surely through all of creation*

Matthew 16:13 - 20 *Who do you say that I am?*

Prayers for the Search Committee and It's Work

It makes a difference that search committee meetings begin and end with prayer, both formal and informal, in being open to the presence of the Holy Spirit. Free-form prayers can be offered for the members of the search committee, the Vestry, the interim, people in leadership during the interim process, candidates, the parish family, and the Diocese. Leadership can be rotated; members may want to bring to the group prayers they have found especially helpful.

Many search committees have found it helpful to compose a short prayer, which is said together at meetings and by the entire congregation during corporate worship. It can be printed in the bulletin.

It is a good idea for the Search Committee to have a lay "chaplain". A chaplain can assist in keeping the work and meetings of the Search Committee grounded in Scripture and prayer.

See also the Book of Common Prayer pp. 816 - 818, for Prayers for the church.

From the Book of Common Prayer

O God, by whom the meek are guided in judgment, and light rises up in darkness for the godly: Grant us, in all our doubts and uncertainties, the grace to ask what you would have us do, that the Spirit of wisdom may save us from all false choices, that in your light we may see light, and in your straight path we may not stumble, through Jesus Christ our Lord. AMEN.

A Reading from I Corinthians 12: 4-11

There is a variety of gifts but always the same Spirit; there are all sorts of service to be done, but always to the same Lord: working in all sorts of different ways in different people, it is the same God who is working in all of them. The particular way in which the Spirit is given to each person is for a good purpose. One may have the gift of preaching instruction given him by the same Spirit; another the gift of faith give by the same Spirit, another again, the gift of healing, through this one Spirit; one, the power of miracles; another, prophecy; another the gift of recognizing spirits; another the gift of tongues and another the ability to interpret them. All these are the work of one and the same Spirit, who distributes different gifts to different people just as he chooses.

Sample Parish Surveys

Please check with the Canon to the Ordinary who will provide several sample surveys for your consideration. The Canon to the Ordinary is a great resource for the development of an individualized and tailored survey instrument for your congregation.

Sample Form for Telephone Interview with Candidate's Reference

Candidate: _____

Interviewer: _____ Phone _____

Reference Contacted: _____ Phone: _____

Address: _____

1. What is your relationship to _____ ? (friend, clerical assoc., etc.)?
2. What are his / her major strengths?
3. What areas of ministry do you see _____ 's growing edges?
4. Do you believe that _____ is qualified to assume a leadership role in a multifaceted church? (Reference may ask for some background, i.e., active outreach program, Christian education, etc.)
5. How do you see _____ relating to a team ministry? (Follow-up question: Do you envision the candidate having difficulty working in conjunction with traditions?)
6. How would you describe _____ 's present leadership ability/style?
7. How would you describe _____ 's organizational skills?
8. How does _____ work with youth and young adults in his present position?
9. Is there anything else you can tell us about _____ from a professional perspective, which might be meaningful?
10. Would you care to give us a name of one or two others who could tell us about _____, particularly in an area he or she demonstrates a strong interest or skill?

Sample Letter to Priests NOT Continuing in the Process

Dear [Name]:

On behalf of the Search Committee, I would like to thank you for your interest in St. Paul's Church. All of us are deeply impressed with the gifts you bring to the church's ordained ministry. We appreciate the time and effort you took to make these gifts known to us.

The Search Committee had the very difficult task of coming up with a list of _____ candidates for the position of Interim out of a pool of extremely qualified and talented individuals. I regret to inform you, that after careful and deliberate review, the Search Committee decided not to include your name on the list of candidates we sent to the Bishop for his approval.

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

Faithfully yours,

John Smith, Chair

St. Paul's Church Search Committee

Sample Letter to Priests on Bishop's Approved List of Candidates

Dear [Name]

On behalf of the Search Committee, I am happy to tell you that you are one of [number] priests whose names have been included in the Bishop's approved list for our search process. All of us are most impressed with your many gifts and we look forward to meeting with you.

Please let us know if you remain interested in being a candidate for Interim of St. Paul's. We would like to arrange an interview with you and members of our Search Committee as soon as possible.

Don't hesitate to call the Diocesan Deployment Officer, The Rev. Canon Eric Cooter at (405) 232 4820 if you have any questions or need further information about the search process.

With all best wishes to you in your ministry.

Faithfully yours,

John Smith, Chair

St. Paul's Church Search Committee

Model for Protecting Privileged Information

All information gathered by the Search Committee during the interviewing phase must be kept confidential. Search Committee members should make clear to family, friends, and parishioners that all information will be kept confidential until the final candidate has been elected by the Vestry, the Bishop has approved the call, and negotiations with the candidate are completed.

NOTE: This suggested process can be created and maintained utilizing technology and/or a cloud-based secure mean,s as well as hard copy documents.

1. Label a set of file folders, one for each member of the Search Committee and one marked "Master." to keep all of the original papers of each candidate.
2. From the originals, make one copy for each file of the materials for each nominee on the Bishop's Approved List, as follows:
 - a. OTM Personal Profile
 - b. Résumé/*Curriculum vitae*
 - c. Additional materials: There may be materials that are bulky or otherwise difficult to copy. In those cases, retain such items in the Master File only, and put note-describing material in each file.
 - d. Any significant correspondence with the nominee.
 - e. Collate the material on each nominee in the order above, and staple.
 - f. Note: these materials are at the highest level of confidentiality. For the integrity of the search process it is important that they be seen by no one but members of the Search Committee.
3. Place materials for each nominee in alphabetical order in each file, top of the alphabet at the top of the file as you open it.
4. On top of the whole stack place one copy each of:
 - a. Notes on Bishop's Approved List.
 - b. Notes on field visits
 - c. Reference checks
 - d. Search Committee worksheet
5. Retain originals in a Master File, which is to be kept in a secure place.
6. Make arrangements that all files will be destroyed at the end of the search process.

Tips for Interviewing Candidates

In preparing for interviews with the candidates, it is valuable to think about trying to understand what the candidates have accomplished in the past, rather than what they think they might do in the future. As interviewers, avoid the candidates' speculations. Look for examples from their actual experience. In short, you are looking for **evidence** that the candidate will fill your position ably.

The best indicator of what a person WILL do is what that person HAS DONE.

Therefore we

- seek evidence of qualifications
- avoid disqualifying those we are interviewing
- trust that the proper sorting of qualifications will almost "make the decision for us"

The structure of every question to the candidate (or candidate's reference) is best phrased as...

- Please tell us about a time when you . . .
- How do you (or have you) done . . .
- What have you found to be the best way . . .

After posing a question, it is best to simply listen. The longer we listen the more evidence we gather.

Extend the original evidentiary question to elicit more evidence with encouragements such as:

- That's interesting; please keep going . . .
- We're getting a really clear picture; can you tell us more?
- Can you give us another example along the same lines?

Sometimes one seems to get more "theory" than hard evidence such as these statements: (a) "Well, I always believe in participation." OR (b) "I want to bring out the best in people." What you want to know, in the case of (a) is how do those beliefs translate into actions? How can you learn if and how the Rev. Brown includes members of the parish? In the case of (b) you want to know how the Rev. Shipley brings out the best in people. What questions do you ask?

- Could you help us with a specific example of this?
- What was the outcome of this?
- What difficulties did you overcome?
- What part did you, personally, play?

Remember it may take candidates one or two "false starts" before they draw out the best example. Be patient and encouraging.

Additional guidelines that may enhance a Search Committee's interviewing:

- Only one questioner per topic.
- Maintain eye contact throughout the interview.
- Avoid "yes and no" questions; they elicit very little real information.
- Avoid theoretical or hypothetical questions; they may tell you what a person might do, but they usually don't yield evidence of what a person actually has done.

Experience-Based Interviewing

In any interviewing situation, the object is for the interviewer to understand what makes the interviewee "tick." That means being able to get beyond and behind the superficial information to

discover the PERSON. That process is helped greatly when the questioner frames the questions in a way that directs response toward specific actions and feelings, as opposed to ideas, theories, and abstractions. Anyone can learn to do this kind of experience-based interviewing. It simply means becoming more intentional and more disciplined than in a casual conversation.

Here are some examples to think about and to use as models as you seek to train yourself to interview more effectively.

CASUAL CONVERSATION

1. How important do you consider educational programs in the parish church?
2. What is the role of young people in the Church?
3. What is your administrative management, supervisory style?
4. Do you think the Interim ought to be involved in the financial aspects of the Church?

EXPERIENCE-BASED INTERVIEWING

1. Describe the program, budget, and time commitment that you gave to education in your present position.
2. Tell me about what you have done to make young people feel welcome and involved in the Church.
3. Share with me an example of a worker-supervisor relationship that you have been a part of in which both persons were growing and performing at a high level.
4. What part did you play in the financial decisions and planning of your last parish?

Sample Questions for Interviews

General Questions

- Tell us something about your ministry goals.
- At your present/most recent congregation, of what accomplishments are you most proud?
- Tell us about why you would now consider leaving your present position.

Spiritual Development

- How do you keep your own life spiritually nourished?
- Tell us about any spiritual programs for individuals or groups you have developed and how you implemented them.

Worship/Liturgy

- How do you go about planning a service? How do you involve youth, the congregation, or other special groups in the service?
- How do you develop your sermons? Describe your preaching style.

Pastoral Care

- Please tell us your approach to pastoral care. Tell us about an especially significant pastoral care relationship
- How do you share the responsibility for this ministry with your parish?
- Please describe your ministry with special groups, such as hospice, the elderly, refugees, or others.

Christian Education

- Describe your training and experience in Christian education for young children, youth and adults.
- At your most recent parish, how was Christian education implemented and what was your role?
- What was the most well-received Christian education program you implemented? What made it so?

Membership

- Tell us about experiences you have had in trying to expand church membership.
- What strategies have you found helpful in bridging the generation gap in the parish?

Social Issues

- How do you deal with social and political issues about which you feel strongly?
- Describe any experience you have had with division in a congregation over social issues.
- If the Episcopal Church takes a position with which you disagree how might you (or did you) proceed?

Administration

- Tell us about your administrative experience.
- How were/are tasks and goals set and assignments made? How do you measure the effectiveness of programs and ministries?
- Describe your experience, if any, in firing someone. What was effective and ineffective?
- Describe your working relationship with the Diocese and the National Church.

Relationship with Vestry

- How have you experienced your relationship with the Vestry/Vestries? How might they describe your style of working with them?
- Do you and your Vestry participate in an annual Mutual Study of Ministry (Mutual Ministry Review)?

Closing

- What question should we have asked you?
- What questions do you have for us?

Candidates to Receive Visits in Their Own Congregations

Model Search Committee Visitation Report

Following are some of the things you may want to look for as you visit candidates in their own parishes. Try to be observant of others attending the service as well as noting your own reactions to the service, the sermon, and the church itself. The more specific you can be in your observations, the more effectively you will be able to compare your own reactions to those of the others on the Search Committee. Here are some examples that might help get you started:

WHAT WAS YOUR EVALUATION OF:

- **Sermon?** Both your thoughts and your feeling reactions are helpful to note.
 - How did you feel? Bored? Disinterested? Inspired? Guilty? Ready to do something? Excited? Angry? Happy?
 - What were your thoughts? Challenged? Confused? Clear? Stimulated?
 - Did he/she preach from the pulpit? Where?
 - Did you: Want to talk about the ideas? Hurry home to do something else?
- **General conduct of service?**
 - Were there lay people involved?
 - How many?
 - Children? In what ways?
 - Is that appealing to you?
 -
- **Liturgical style?**
 - Vestments? Sung service? Said service? Incense? Gospel procession?
- **The church itself?**
 - In need of repair? Clean? Fresh flowers? Dingy? Well cared for?
- **What did you think about the candidate's:**
 - Organization of ideas?
 - Easy to follow? No clear, main message? Good examples that reminded you of your own life experiences? No examples at all? Related well to the scriptures?
 - Didn't seem to relate at all? Too political? Not aware of social issues?
 - Ease of conversation?

- Talked to people as they left church?
 - Friendly, went out of his/her way to meet new people?
 - Talked mostly to one or two people?
 - Cordial but didn't go out of his/her way to meet people?
 - Seemed to know a lot about the people he/she greeted?
- Manner of meeting people?
 - Formal handshake?
 - Warm words with open smile?
 - Seemed shy but cordial?
 - Hugged someone?
 - Greeted children?
 - Ignored children?

Record Your Responses

VISITATION REACTION SHEET

You can use this form to record your reaction after visiting a candidate and listening to him or her preach and celebrate.

What was your evaluation of:

1. SERMON?

- a. How did you feel? Bored? Disinterested? Inspired? Guilty? Ready to do something? Excited? Angry? Happy?

.....

- b. What were your thoughts? Challenged? Confused? Clear? Stimulated?

.....

- c. Did he/she talk from the pulpit?

.....

- d. Did you: Want to talk about the ideas? Hurry home to do something else?

.....

- e. How was the organization of ideas? Easy to follow? No clear, main message? Good examples that reminded you of your own life experiences? No examples at all? Related well to the scriptures? Didn't seem to relate at all? Too political? Not aware of social issues? Note the topic for future reference.

.....

2. GENERAL CONDUCT OF SERVICE?

Were there lay people involved? How many? Children? In what ways? Is that appealing to you?

.....

.....

3. LITURGICAL STYLE?

Vestments? Sung service? Said service? Incense? Gospel procession?

.....
.....

4. THE CHURCH ITSELF?

In need of repair? Clean? Fresh flowers? Dingy? Well cared for?

.....
.....

WHAT DID YOU THINK ABOUT THE CANDIDATE'S:

1. EASE OF CONVERSATION?

Talked to people as they left church? Friendly, went out of his/her way to meet new people? Talked mostly to one or two people? Cordial but didn't go out of his/her way to meet people? Seemed to know a lot about the people he/she greeted?

.....
.....

2. MANNER OF GREETING PEOPLE?

Formal handshake? Warm words with open smile? Seemed shy but cordial? Hugged someone? Greeted children? Ignored children?

.....

A “Field Guide” when visiting Candidates

1. Maintain maximum uniformity among your field visits. Develop a definite plan of questions to be asked, with only modest modifications, of each candidate.
2. Assign a team leader to each candidate to coordinate a field visit. The team leader will be responsible for communicating with the candidate and arranging all the details of the field visit. The team leader should contact the candidate by phone, followed up by a letter, to confirm the date and schedule of the team visit, which should include as many of the following as possible:
 - a. informal time with the candidate (and spouse); perhaps over a meal
 - b. attendance at candidate's Sunday worship, keeping a low, unobtrusive profile
 - c. time with the candidate in the candidate's daily environment: office, and if possible and invited, home
 - d. sit down conversation/interview with the candidate
 - e. use Tracking of Candidate Information Form as a guide
3. Take full advantage of your visit in the candidate's home environment to gather full impressions and materials
 - a. allow time during the field visit to walk around the candidate's workplace neighborhood in advance of meeting the candidate.
 - b. ask for copies of any current materials available that reveal aspects of the candidate's ministry, such as service leaflets, newsletters, the sermon you heard, most recent parish annual meeting report, and brochures on parish programs or policies.
4. Observe the courtesies that invite candidates to remain in conversation with you. In particular...
 - a. pay for all expenses involved in field visits.
 - b. make clear the remaining steps in your process; leave the team leader's address and phone numbers with the candidate, and tell the candidate when she or he may next expect to hear from you.
 - c. team leader writes a thank you note to the candidate immediately upon return from field visit.
5. The visiting team writes a complete report of the field visit. The last section is a summary titled, "Evidence that this candidate would make a good Interim for us."
6. One week after the field visit, the team leader calls the candidate to discuss whether the candidate remains interested in the position and to outline next steps.
7. When all field visits are completed, along with their written reports and referencing, the Search Committee decides upon final candidates to present to the Vestry.

8. Search Committee Chair writes to all candidates who did not make the final list to thank them for their participation in this process. [See Sample Letter for "Candidates Who Did Not Make the Final List" on page 44]
9. Notify the Diocesan Transitions Minister that you finalists have been selected. Pending approval from the DTM, the Warden phones all candidates to inform them that they have been approved as final candidates and to arrange an individual interview for each candidate with the Vestry. These arrangements should be confirmed in writing.

Sample letter to Priests Not on Final List of Candidates

Dear [Name],

The Search Committee members have interviewed all candidates for the position of Interim of St. Paul's Church. The interviewing process was an extremely rich and rewarding time for the Search Committee. We are deeply grateful for the opportunity to have met so many gifted and talented candidates.

After much thought, discussion and prayer, the Search Committee has agreed upon a final list of candidates to present to the Vestry. Although I regret to inform you that your name does not appear on this list, I want you to know that the Search Committee is most impressed with your skills, experience, and the many gifts you bring to the church's ordained ministry. Thank you for letting us into your life to make those gifts known to us.

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

Faithfully yours,

John Smith, Chair

St. Paul's Church

Search Committee

Sample Schedule for Interviewing Final Candidates at your location

This sample agenda shows one way to cover the important bases when bringing a final candidate to your parish for a visit. Circumstances will probably require alterations in the schedule for each Candidate's visit.

Friday

- 8:00 Breakfast with Vestry "Guides"
- 9:00 - 12:00 Tour the area: Home purchase possibilities, schools, possible employers for spouse, or other items of personal interest to Candidate.
- Noon 1:00 Lunch
- 1:00 - 5:00 Visit with Bishop (time allocated includes travel time). Please contact the Bishop's Executive Assistant, Lesli Graft to arrange this essential visit.
- 6:30 Dinner with the Vestry. Arrangements should include opportunities for informal conversations as well as structured "getting to know us" presentations. Name badges are appropriate.

Saturday

- 8:00 Breakfast with members of the Vestry
- 9:30 - Noon Formal interview with Vestry. Spouse is entertained by Search Committee members or Vestry member spouses - continue tour of the area.
- Noon - 1:00 Lunch with Wardens
- 1:00 - 3:00 Candidate and spouse depart.

Contracting with new Clergy

It is VERY important that the Diocesan CFO is aware when you are preparing to offer a financial package to a priest. Fiscal policy is capable of change on the national as well as the diocesan level. The CFO will be a great asset in advising you of any recent changes.

In general, please note that clergy are a unique entity in the eyes of the Federal Government.

- Considered “self-employed” and file Schedule “C” (and pay a self-employment tax)
- Wages are reported on Form W-2

Sample breakdown of a typical clergy compensation package

1. Stipend (Figure for providing the clergy with a “living”)	\$ _____
2. Housing Allowance (not subject to income tax)	\$ _____
3. Total Compensation: (lines 1-2)	\$ _____
4. Pension base: 18% of the “Total Compensation.”	\$ _____
5. Mileage	\$ _____
6. Reimbursable expenses	\$ _____
7. Medical (Full Family Coverage is required in Diocese of Oklahoma)	\$ _____
Total Budget expense (lines 3-7)	\$ _____

Model Vestry Behavioral Covenant

This new relationship will require mutual support. In *Fresh Start*, many of our parishes report that the use of a “Vestry Behavioral Covenant “ is a very helpful guide. The following is taken from the *Fresh Start* session on Conflict Management. This should be amended and reviewed annually.

Our Promises to God

- We promise to pray, alone and together, to thank God and to ask for God’s help in our lives and in our work for our Church, and we promise to listen to God’s answer to us.

Our Promises to Our Church Family

- We promise to demonstrate our leadership and commitment to our Church by our example.
- We promise to support our Church pastors and staff so that their efforts can be most productive.
- We promise to try to discover what is best for our Church as a whole, not what may be best for us or for some small group in the Church.

Our Promises to Each Other (as Vestry Members)

- We promise to respect and care for each other.
- We promise to treat our time on the Vestry as an opportunity to make an important gift to our Church.
- We promise to listen with an open, non-judgmental mind to the words and ideas of others in our Church and on the Vestry.
- We promise to discuss, debate, and disagree openly in Vestry meetings, expressing ourselves as clearly and honestly as possible, so we are certain that the Vestry understands our point of view.
- We promise to support the final decision of the Vestry, whether it reflects our view or not.

Date _____

Mutual Ministry Review

Ed Koch, onetime Mayor of the City of New York, was famous for his phrase “How am I doing?” Now that you have called a priest, you too will need a method for asking this question of yourself and your new priest. This is not a performance review.

- "What is working well and what needs our attention?"
- "Do we need to make changes in our stated goals?"
- "Are our goals relevant to where we find ourselves today?"
- "Are our expectations fair, realistic, a stretch but not impossible?"

MMR models the behavior of candid feedback by asking "How are we doing?" Evaluation occurs on an informal basis all the time. MMR is a process for stimulating open discussion so that appropriate change can be planned. Instead of happening in the parking lot after church, on the phone, or during coffee hour, MMR is a way to thoughtful, caring, and conscientious review and discussion of how the congregation, its leadership, and the clergy are working together.

Developing excellence in ministry cannot be accomplished by one person - the priest. Excellence occurs when the laity and the clergy leadership are committed to a shared vision of God's calling for the ministry of their congregation. The partnership is essential. Evaluating only the priest's work toward the vision demeans the role of the laity and denies the possibility of growth and development of their ministry - of their relationship to God through God's church.

While we constantly struggle with the idea of whether or not we are really being faithful to God's call, the idea of a formal review or evaluation is often threatening and scary. But without taking the time to ask, "Where are we going? And how are we doing in getting there?", opportunities to live out our faith are lost.

The Diocese has a number of clergy and lay people who have been trained to facilitate a MSM. To schedule a MMR, please call Diocesan House.

Church Leadership Team Retreat

After a new call has been issued and accepted, there is much joy, great relief and often a sense on the part of the Vestry that "we got the job done." In reality, the Vestry's job is far from over. Of course, the Letter of Agreement must be negotiated and a date for the institution must be scheduled, but, more importantly, the Vestry and the priest must set aside some time to discuss how they will work together and how they can make their joint ministry successful.

A Church Leadership Team Retreat provides a time apart for the Vestry and the Priest to define and understand their relationship. It is recommended that this retreat be held no later than 4 weeks after the priest arrives.

There are a great many expectations and questions, on the part of both the Vestry and the priest, at the start of a new pastorate. Some may be significant in nature, others less so. The priest, for example, needs to know some of the "hot buttons" within the parish, how the Vestry worked with the previous priest day to day and how the Vestry would like to work with him or her in the future. A Vestry, on the other hand, needs to be aware of any concerns the priest has about his or her personal life, family, boundaries, and what the priest would like to do or see happen in the short term.

A retreat encourages open and honest dialogue as well as clarification of expectations, roles and responsibilities. It helps the priest and lay leadership get off on the right foot by talking about how they want to work together, how they will deal with differences and how they will support one another in their effort to answer God's call.

The retreat covers a range of topics which includes:

- **Spiritual Reflection:** Bible study and the sharing of spiritual journeys provide a foundation for the retreat. It is also a time for the participants to get to know one another better and to be reminded of the fact that the work ahead of them is grounded in a spiritual way. God is at work in them!
- **Develop Guidelines for Working Together:** In order for the leadership team to work well together, it is important that everyone agrees to adhere to certain guidelines and rules. A definition of acceptable behavior and a discussion of how people would like to be treated will go a long way in developing good working relationships.
- **Clarify Expectations:** Taking the time to ask questions of one another--openly and honestly--will clarify expectations and lessen fears or anxieties.
- **Review Goals:** It is important that the new leadership team review the goals that had been identified during the interim time. Some of the short-term and/or long-term goals may need to be revised or clarified.

- **Clarify Roles and Responsibilities:** Identify the activities and functions that are carried out in the parish and discuss who is directly responsible to see that specific decisions and actions occur. Openly talk about when the Interim, Wardens, Vestry, staff and members of the congregation need to be consulted or advised before a decision can be made. Review the canonical responsibilities of both Interim and Vestry.
- **Dealing with Differences:** The team, acknowledging the fact that differences will occur, agrees as to how these differences will be handled.

Although this retreat is recommended at the very beginning of a new pastorate, any church leadership team can take advantage of this resource at any time . . . it doesn't matter if a priest has been with a congregation for two or twenty years.

Episcopal Diocese of Oklahoma

The Search Process

A “Quick Reference” guide

2020

The Episcopal Diocese of Oklahoma

Website: www.epiok.org

**** This document represents the normal “Step-by Step” process for diocesan searches. It is not intended to be exhaustive nor regulatory, rather it offers a general outline of the process for calling a new priest in the Episcopal Diocese of Oklahoma.**

STEP 1: Rector announces departure. Process begins.

STEP 2: Wardens Notify Bishop effective date of opening.

STEP 3: Wardens conduct Clergy “Exit Interview” when appropriate.

STEP 4: Diocesan Transition Officer meets with Vestry to review the Search Process

****We strongly recommend that the Search Committee not be formed at this time**

STEP 5: Congregation celebrates the ministry of the Rector.

Step 6: INTERIM?

- **INTERIM** - An Interim will be selected to pastor the congregation during a search. This person is called by the Vestry, in consultation with the Bishop’s Office, who will provide candidates. This search generally gets underway soon after the priest announces that he or she is leaving. An Interim ***may not be called to serve as Rector*** and should not be sought for opinions regarding candidates.
- **PRIEST-IN-CHARGE** - A priest retained to lead the parish for a term. A Priest-in-Charge has full authority of the Rector, except tenure, unless otherwise specified in a Letter of Agreement.

Step 7: VESTRY ORGANIZES for WORK

- **Self-Study Subcommittee:** This committee is charged with developing a self-study of the congregation, which will include developing, distributing, and tabulating the responses from a congregation-wide survey, designed to solicit input, feedback, and participation from the entire congregation in the search process.
- **Parish Profile Subcommittee:** This committee utilizes several resources (survey, meetings, conversations) to develop the primary marketing media to be used in the search process (THE PARISH PROFILE and OFFICE of TRANSITION MINISTRY PORTFOLIO). These two documents are published through multiple national and regional transition search sites and they become the primary advertisements used to develop a viable candidate pool.
- **Website Subcommittee:** The parish website is one of the first places interested clergy will visit when considering a call. This committee will review the website from the perspective of an interested candidate and create a landing page for all application materials associated with the search. Please see the Canon to the Ordinary and Mr. Garland Pollard, Diocesan Communications Director for guidance or support with this project
- **Clergy Compensation Subcommittee.** Clergy Compensation is a complex issue, mostly due to the unique status that Clergy have under the Internal Revenue Service Tax Code. The early stage of a search is a good time to

begin developing a compensation package that is sustainable within the existing budget, and competitive within the norms of the church. Martha Goodwill who works in the Bishop's office is very knowledgeable in all aspects of clergy compensation and always available and willing to offer her wisdom and counsel as you develop your compensation package.

STEP 8: VESTRY RETREAT : As the Vestry's subcommittee work comes to a close, all the information is gathered and delivered to the Vestry who may set aside some "retreat time" in order to reflect, pray, evaluate the marketing materials, and form a Search Committee.

STEP 9: VESTRY FORMS SEARCH COMMITTEE: Vestry communicates the mission of the Search Committee to the committee members

SAMPLE CHARGE TO THE SEARCH COMMITTEE

We, the Vestry of _____, desiring to call a Rector, do hereby delegate to our Search Committee the task of recommending a Candidate (or Candidates) to the Vestry

We hereby charge to the Search Committee:

- *While the Committee consists of only those so-named by the Vestry, the Committee may (as the budget allows), seek outside consultation and assistance as needed*
- *There shall be _____ final candidates presented to the Vestry*
- *Candidates will be presented to the Vestry no later than dd/mm/yyyy*
- *The Committee shall conduct the search within the Vestry-approved budget*
- *The Self-Study materials will form the basis of the criteria*
- *The Committee will regularly communicate with the congregation as to the status of the search*
- *The Committee will reveal the names of Candidates only to the Vestry*
- *Once the Call is issued and accepted, the Committee will take an active role in assisting the new priest and his or her family as they settle into the community*
- *(add your own)*
- *If these criteria cannot be met, the Vestry may reorganize or dissolve the Search Committee.*

STEP 10: Developing a Candidate Pool (sources of candidates)

It is important that all materials of priests who are submitted as Candidates funnel together in an orderly way to the Diocesan Transition Officer. As the Bishop has a responsibility to oversee and safeguard the process:

- **CONGREGATION NOMINATIONS:** Members of the congregation will be eager to recommend potential candidates. The Search Committee should encourage this. A

"suggestion box" may be helpful. Require members to get the consent of any priest referred for the search BEFORE submitting-- this saves precious time.

- **CANDIDATE SELF-NOMINATIONS:** Interested priests will contact the Search Committee directly or through the parish website. It is important for such names to be forwarded to the Bishop's Office as soon as they are received as we do not want to unnecessarily delay the process with our own referencing process.
- **DIOCESAN NOMINATIONS:** Diocesan office maintains an active file of priests, both within and outside the Diocese of Oklahoma who are looking for new positions.
- **NOMINATIONS FROM THE EPISCOPAL CHURCH:** Priest will respond to the announcement from the publication of the Parish Profile and OTM Portfolio on the parish website, diocesan website, Episcopal News Service, and other sources (Transition Officer will assist with this process).

***** CONFIDENTIALITY NOTE: Names of candidates are confidential and should not be shared with anyone outside of the Search Committee. *****

STEP 11: Diocesan Office Conducts "RED FLAG" Reference Checks

- An initial reference check by the Diocese must take place in order for any candidate to proceed.
- These reference checks are usually between the Canons to the Ordinary of the two dioceses involved, but there is the occasional "bishop-to-bishop" reference.
- The reference check generally pertains to the candidate's fitness for ministry. It is ascertained that the candidate is in "good standing" with their home diocese and that there are no disciplinary or pastoral issues that would preclude the candidate's service.
- NOTE: Not all the candidates submitted will be returned back to the Search Committee and that Diocesan House will not be in a position to disclose the reason(s) why.
- The Bishop will review this list and may make additions and/or deletions. This approved list becomes the official list of candidates and will be submitted to the Search Committee.

STEP 12: THE SEARCH COMMITTEE'S WORK BEGINS: infused with humility and prayer.

- **Assess the Candidates:**
 - *Review All Candidate Materials:* Please avoid thinning the list at this point!
 - *Send questions* to the candidates to assess how they communicate in writing. Questions should be about four in number and related to the values found in the self-study.:
 - Personal Reference checks (please do not contact Diocesan Office references – duplication)
 - Review social media (Facebook, blogs, Twitter, online sermons, etc.)
 - Conduct Skype or Telephone Interviews.
 - Begin initial assessments and narrowing the candidate pool.

- **Selection of FINAL Candidates**
 - When candidates to receive visits in their own parishes have been selected, the Canon to the Ordinary is notified right away.
 - The Bishop makes a final “bishop-to-bishop” reference check.
 - A formal background check is completed (and paid for) by Diocesan House (may take up to two weeks). **NOTE: The background check is the property of the Diocese and may not be disclosed.**
 - Pending approval from the DTM, the Warden phones all candidates to inform them that they have been approved as final candidates and to arrange an individual interview for each candidate with the Vestry. These arrangements should be confirmed in writing.
- ***SEARCH COMMITTEE makes its final candidate recommendation to the Vestry.***

STEP 13: DISCERNMENT and DECISION:

- *The Vestry Interviews the Final Candidate(s)*
 - Vestry invites final candidates to *come to the parish for an interview* with the Vestry.
 - If the candidate is not from this Diocese, arrangements must be made for an interview with the Bishop. Please contact Lesli Graft to make arrangements.
- *The Vestry elects the Rector/Priest-in-Charge*
 - Records its action in the minutes in the form of a resolution and recorded vote.
 - The name of the elected person is presented to the Bishop prior to that person being advised.
 - Canons require that the Bishop give consent to the call.

STEP 14: THE CALL and NEW MINISTRY

- *Letter of Agreement (LOA)*
 - Vestry negotiates the terms of the call (Compensation, benefits, relocation, etc.)
 - The Diocesan Office provides the Vestry with an approved LOA Boilerplate to be used.
 - Please have three (3) originals signed by the Rector-Elect and the Wardens on behalf of the Vestry and Parish. All three are signed and sent to the Bishop for review. Diocesan House returns the remaining two copies to the Interim elect and Parish respectively.
- ***FINAL STEPS***

- Search Committee advises all nominees not previously advised that they are no longer under consideration, and thanks them for their participation in the process.
 - Vestry makes plans to celebrate the ministry of the Interim.
 - The Bishop and Rector-Elect agree upon a date and time for the Celebration of a New Ministry (Institution and Induction). The Installation/Induction formally invests the Rector-Elect as Rector. As it is a celebration of the larger community, it needs to be held at a time when those outside the Parish can attend.
- MAKING THE BIG ANNOUNCEMENT
 - Have a press release on hand (preferably with photographs) for release to the local media and the Diocese. You may call the Diocesan Director of Communications for assistance.
 - The first announcement should be made orally to both the current and receiving congregations on the same Sunday.
 - Diocesan House will contact the local Dean.