

Caring for Clergy in the Calling Process
Fourth Edition
Guidelines for Parish Calling/Search Committees

FOREWORD

This is one of the publications which the Board for Church Deployment provides through the Church Deployment Office to help Parish Calling/Search Committees and Vestries in calling ordained leaders to serve in their congregations.

These publications are based on experience and expertise developed in thousands of calling processes. The principles should apply to most situations, but there will always be variations and exceptions in emphasis and details. So feel free to pick out what seems most applicable to your situation.

Board for Church Deployment

BEFORE EVERYTHING ELSE

We commend the focus of prayer and Bible study during the time of your calling process. The following are appropriate for the vestry, the Calling Committee, and the whole congregation:

PRAYERS

For the Church

Gracious Father, we pray for thy holy Catholic Church. Fill it with all truth, in all truth with all peace. Where it is corrupt, purify it; where it is in error, direct it; where in anything it is amiss, reform it. Where it is right, strengthen it; where it is in want, provide for it; where it is divided, reunite it; for the sake of Jesus Christ thy Son our Savior. ***Amen.***

For the Ordained

Almighty God, the giver of all good gifts, in your divine providence you have appointed various orders in your Church: Give your grace, we humbly pray, to all who are called to any office and ministry for your people; and so fill them with the truth of your doctrine and clothe them with holiness of life, that they may faithfully serve before you, to the glory of your great Name and for the benefit of your holy Church; through Jesus Christ our Lord, who lives and reigns with you, in the unity of the Holy Spirit, one God, now and for ever. ***Amen.***

For Guidance

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 to do, that the Spirit of wisdom may save us from all false choices, and that in your light we may see light, and in your straight path we may not stumble; through Jesus Christ our Lord. ***Amen.***

BIBLE STUDY PASSAGES

Sharing Leadership: Numbers 11:16-17, 24-25a

Discernment & the Variety of Gifts: Romans 12:1-18

Sources of Recommendation & Qualification: 2 Corinthians 3:1-9

Jesus' Prayer for the Church: John 17:15-21

God's Call to Holiness: 1 Peter 1:13-21

I. INTRODUCTION

- A. We recommend these guidelines to your committee. They provide an outline based on the experience of thousands of calling processes. This guidance can make your task and the experience of candidates with whom you communicate a more caring, creative and Christian experience for all. Other publications are available from the Church Deployment Office. (A very detailed resource book, ***Choosing to Serve: Resources for the Calling Process*** (for the use of bishops, diocesan deployment Officers, and consultants working under their supervision).
- B. The calling process works best when the following steps have been taken:
1. Close communication during this process has been established with your bishop and diocesan deployment officer and a consultant approved by the bishop has been engaged.
 2. A Calling Committee of 9-13 members has been appointed by the vestry, and this committee has been carefully chosen to represent your parish (i.e., young and older members, women, men, newcomers, long-term members, etc.).
 3. A careful parish self-study has been undertaken and an accurate parish Profile has been completed.
 4. A position description has been written based on the strengths and needs you identified in your self-study and expressed in the parish Profile.
 5. The committee has, with the authorization of the diocesan office, used the services of the Church Deployment Office.
 6. The committee has received adequate training and guidance, particularly in interviewing skills and group process. (Section C below lists some dependable resources.)
- C. The following resources have proven particularly useful to vestries and Calling Committees.

Available from parish or diocesan offices:

- **Diocesan and National Canons**
- **The Episcopal Church Annual (for clergy & diocesan office addresses)**

Available from the Church Deployment Office:

- *Interviewing in the Calling Process*
- *Prayer in the Calling Process* by Verna Dozier
- *Search: a Manual for Those Called to Guide the Parish Through a Process Leading to the Election of a Rector* by Charles Wilson

Available from The Alban Institute (www.alban.org):

- *Beginning Ministry Together: the Alban Handbook for Clergy Transitions* by Roy Oswald, James Heath and Ann Heath
- *Critical Moment of Ministry* by Loren B. Mead
- *A Change in Pastors...and How it Affects Change in the Congregation* by Loren Mead
- *Saying Goodbye: A Time of Growth for Congregations and Pastors* by Edward A. White
- *So You're on the Search Committee* by Bunty Ketcham with Celia Allison Hahn
- *Temporary Shepherd: a Congregational Handbook for Interim Ministry* ed. Roger Nicholson

- D. The promises of our Baptismal Covenant apply to the calling process. The basic guideline for the treatment of all persons throughout your committee's ministry is "To seek and serve Christ in all persons, loving our neighbor as ourselves."

The following resolution on non-discrimination and affirmative action is one way the Board for Church Deployment seeks to uphold the Baptismal Covenant:

That the Church Deployment Office make use of every opportunity to lead the Church into providing at all levels opportunity for employment regardless of race, marital status, age or sex, and...

That to that end the Church Deployment Office establish and make known to the Church a policy of not using such categories in searching its files for the purpose of deployment, except to further by positive action the deployment of women and minorities.

II. COMMUNICATIONS

- A. Appoint chair and secretary. You may need two secretaries, one for keeping accurate minutes and one for correspondence with candidates.

Commentary:

Regular communication with candidates is essential during the calling process. If volunteer secretaries are unable to handle the volume of work, consider paying someone part-time.

Correspondence with candidates should be quite open as to where the Calling Committee is in the process at that moment. Clergy in search of a new call are often at a critical point in their lives. It is disrespectful to leave candidates guessing as to where they stand in your process.

- B. Plan for communication with vestry and parish. Every regular vestry meeting needs to include a progress report from the Calling Committee. Likewise, regular reports to the congregation on tasks accomplished and next steps help parishioners to understand and support the committee's work.

Commentary:

This is also a time of stress for your congregation. Your committee will be caught up in the pressures of its work, but needs to remain sensitive to the stress of the congregation and open about the progress of your work. All this is a two-way street: it is appropriate to keep the Calling Committee and candidates in the public prayers of the parish.

III. OPERATING LIMITS

- A. **Budget:**

The Committee should be given a budget by the vestry. For a medium-sized parish, at least \$3,500 to \$8,000 is reasonable for communication, field visits with candidates, and visits of final candidate(s) to your parish.

Commentary:

The largest costs are travel expenses: mileage reimbursement or airline tickets. The \$3,500 to \$8,000 estimate is based on experience. Your diocese may provide a consultant to guide the committee in its work. An adequate budget makes it possible to include persons on your committee who could not otherwise afford to travel to visit candidates.

Small congregations may not be able to allocate as large a budget as they would wish. This may have the effect of limiting the geographical range of your activities.

- B. **Qualifications for the Position:**

Design your self-study and parish Profile to clearly define your congregation, its values, its gifts, and the ministry to which God is calling you. On that basis, articulate your goals and the responsibilities that the person who fills the open position will need to have to help you fulfill those goals.

These goals and responsibility statements provide the foundation for defining the qualifications for the position — the skills, giftedness and experiences you believe are needed to fulfill the position's responsibilities and to help meet the goals implied in God's call to the congregation.

Commentary: The Parish and Position Profiles outline the framework within which the committee exercises its ministry of discernment. It is important to be thoroughly familiar with this framework. Return to it again and again for

focus and continuity in the committee's work. There are no guarantees, but such disciplined focus and continuity seem to be the key to a happy outcome for both clergy and congregation.

C. **Costs of the Position:**

The vestry needs to give the committee clear direction with regard to the financial dimensions of the position — not only compensation, but other costs as well:

1. Compensation Elements (pension-based compensation)
 - a. Stipend (range)
 - b. Housing (provided or allowance)
 - c. Utilities
 - d. Social Security Allowance
 - e. Equity Allowance
2. Benefits (insurance, pension, etc.)
3. Travel, other reimbursable professional expenses
4. Vacation, sick leave, continuing education, sabbatical
5. Budget for moving; start-up costs

Commentary:

Canon law charges the vestry with responsibility “in all matters concerning . . . corporate prosperity and the relations of the Parish to its Clergy.” Many dioceses have minimum standards and other guidelines regarding these matters. Three publications available from the Church Deployment Office outline clergy compensation basics, and touch on other costs of clergy positions:

- *Called to Work Together: a Handbook on Letters of Agreement for Clergy and Congregations*
- *Caring for Clergy through Compensation*
- *Caring for Clergy through Housing*

IV. COMMITTEE POLICIES & PRACTICES

Each member of the committee needs to understand basic policies and practices. It is important to:

- A. Establish and adhere to a definite schedule of meetings and tasks.

Commentary: Maintaining and adhering to a clear calendar keeps the calling process from bogging down.

- B. Treat candidates with the same respect, courtesy and candor that you hope to receive from them.

Commentary: You touch the hopes, dreams and ministry of each member of the clergy with whom you are in conversation. How you treat them, their family and work situations provides rich opportunity to love your neighbor as you love yourself.

- C. Maintain complete confidentiality of information concerning individual candidates. Destroy all copies of candidates' files at the end of the calling process (except anything the sender has asked to be returned).

Commentary: Serious consequences can result from breaking confidences. It can injure your parish as well as the candidate and the candidate's present ministry situation.

- D. Collaborate with the vestry throughout the process, to equip it to fulfill its responsibility to elect and call the new rector.

Commentary: The canons give the vestry the power to elect a rector and issue a call. The vestry created your committee to minister on its behalf, to do the homework needed for sound vestry decisions.

V. FIRST REVIEW OF CANDIDATES

At the heart of the calling process is the discernment of God's gifts: gifts in the ministry of a priest who can help your parish fulfill its mission, and gifts in the strengths and challenges of your parish that can help fulfill a priest's ministry. Your parish self-study has identified the gifts God has given your parish. You now seek evidence of the gifts God has given those who are candidates in your process.

Commentary:

Avoid disqualifying candidates. Rather look for evidence of gifts which qualify a candidate. It is easy to build a case against anyone, but far more useful to gather evidence of strengths. Committees who take the gift discernment approach find that the weight of one person's qualifications almost makes their decision for them.

Your bishop and diocesan deployment officer, with the help of the Church Deployment Office, will have supplied you with a list of names of possible candidates and their CDO personal Profiles. You may also have received names from parishioners and other sources. CDO personal Profiles for these additional clergy are available upon request through your diocese. Your bishop and diocesan deployment officer may already have done some initial work to reduce the list.

Your list will begin to narrow as you gather evidence in categories that fit the criteria established in your parish assessment. Your consultant or diocesan deployment officer can provide useful guidance, drawing on their experience and on resources such as those found in the Church Deployment Office publication ***Choosing to Serve: Resources for the Calling Process.***

- A. Send potential candidates a packet describing your community, your congregation and the rectorship.

In your cover letter, state exactly where you are in your discernment process (e.g., you are writing to 8, or 15, or 20 clergy; you expect to decide on the next stage by such-and-such a date, etc.). Give names and phone numbers of people to contact with any questions: a committee member and/or the committee's consultant.

Commentary: Complete openness all along the way helps to remove mystery and uncertainty for candidates as the process continues.

Invite those who are interested to send you:

1. A CDO personal Profile and brief resume.
2. Responses to a *few* (not more than three) questions related to the challenges of your open position.
3. A list of references.

Commentary: You are at an early stage in your discernment process. Keep what you ask of candidates in proportion to your investment in them. Lengthy questionnaires are inappropriate. It is also inappropriate to ask candidates to duplicate basic information (such as address, educational data, positions held) already shown on the CDO personal Profile.

- B. Promptly acknowledge receipt of each candidate's material. Carefully read all materials sent to you by interested candidates. Compare the gifts they offer to the needs of your parish. Note a potentially good fit as well as gaps.

Commentary: Take each candidate as seriously as you expect the candidate to take you.

- C. Call at least one reference on each candidate to fill in gaps in your knowledge and to confirm "appropriate fits" that you have discerned.

Commentary: Clergy differ in how skillfully they fill out their CDO personal Profiles, write resumes or respond to questions. Similarly, be aware that all references tend to be subjective, either positively or negatively. Good discernment depends upon a variety of sources and styles of evidence.

- D. Reach a consensus on 2-5 whom you wish to visit. Call them to make arrangements. Write the others to express your thanks for their help, and to tell them you have narrowed your list to a number which does not include them.

Commentary: Openness, fairness and courtesy require careful and timely communication.

- E. Notify the bishop, either directly or through your consultant, of your progress to date.

Commentary: Timely information helps your bishop be a pastor both to you and to the clergy.

VI. FIELD VISITS

Field visits require careful preparation. They represent a major investment by the candidate as well as by your committee. Both sides to the conversation will gather a great deal of evidence about each other.

Commentary: Your consultant and diocesan deployment officer will have suggestions for field visit preparations. A further resource is the Church Deployment Board publication: Interviewing in the Calling Process.

A. Preparations

- Arrange for training in interview skills.
- Assure sensitivity to the personal situations of your candidates.
- Remind yourselves that you are dealing with privileged information that must be kept within the bounds of your committee, even after your work is finished and the committee dissolved.

Commentary: Remember that clergy are human beings with human feelings. Your visit will be a stressful time for them and their family. You will reduce the stress if you take care on the field visit to do or say only what you would welcome done or said in return.

B. Field Visit Plan

1. Maintain maximum uniformity among field visits, so that you gather similar evidence on each candidate.
2. Visit in a team. Three persons offer a good balance.
3. Send ahead materials to help prepare the candidate:
 - a. your parish history, current budget, annual parochial report, current goals and challenges, trends in membership, average Sunday attendance and financial giving (see the Congregational Development website for your church's particular statistics: www.episcopalchurch.org/congdev.htm)
 - b. description of your diocese and community.
 - c. information that addresses possible needs of the candidate's family:
 - or part-time or dual-role positions, supplemental employment opportunities for the candidate.
 - local employment opportunities for the candidate's spouse
 - schools, colleges, medical care resources

Commentary: Your task is to gather evidence for discernment — and to provide the same for the candidates. Openness will give both sides of the conversation the fullest advantage from your visit. Respect for the candidate suggests that your team keep a low, unobtrusive profile.

4. Include these elements in your visit:
 - informal time with candidate (and candidate's spouse), perhaps over a meal.

- attendance at Sunday worship.
- time with candidate in the candidate’s daily environment: office and, if invited, home.
- formal interviewing time with candidate and with two or three persons referred by candidate.

C. Follow-up

1. Send letter within three days after each visit. Express your thanks. Outline next steps in your process. Give phone number of a committee member to call with any questions or concerns.

Commentary: Courtesy and fairness require careful and timely communication. Some candidates may also be involved with other calling processes.

2. Team prepares report on “Evidence this candidate would fulfill the requirements of our position ably.”

Commentary: Keep focused on evidence you have found and the needs your parish self-study identified. If, as you review the evidence, new questions arise, do not make assumptions. The candidate is as near as your telephone. Call and get the additional information needed. Your assumptions can be entirely opposite to the facts.

D. Decision

1. Committee weighs the evidence from all field visits to discern 1-3 candidates to invite for local interviews. Call them to make arrangements. Write or call the others to express your thanks for their help and tell them your decision. Be prepared to give them feedback.

Commentary: To say “Yes” to some is to say “No” to others. It is hard to be turned down. Provide feedback, if invited. Information about strengths and weaknesses you perceive can help candidates grow personally and professionally.

2. Notify the bishop either directly or through your consultant. The bishop may want to make appointments to see your finalists.

Commentary: Your bishop will have canonical responsibility for your new priest, and may now want to conduct bishop-to-bishop reference checks on out-of-diocese candidates.

VII. LOCAL INTERVIEWS

Local interviews provide evidence for discernment by both vestry and candidates.

Commentary: Your consultant and diocesan deployment officer will provide guidance concerning diocesan standards for this nearly final stage of the discernment process. These guidelines assume vestry involvement at this stage.

- A. Preparations
1. Decide on level of vestry involvement in local interviews and provide needed information and training.
 2. Prepare for formal candidate interviews with whole committee.
 3. Provide for confidentiality.
- B. Local Interview Plan
1. Maintain maximum uniformity among local interviews.
 2. Meet all expenses of the candidates.
 3. Send ahead materials to help prepare the candidate, including a schedule for the time to be spent with you.
 4. Include these elements:
 - informal times for candidate (and candidate's spouse) to meet people individually and in small groups;
 - tour of parish facilities and community;
 - opportunities for candidate to meet with bishop, neighboring clergy, parish staff members, vestry members, etc.;
 - formal interview with whole committee;
 - private time and space for candidate and candidate's spouse;
 - attention to specialized needs of each candidate (e.g., exploring employment opportunities for spouse, visiting schools, etc.).

Commentary:

The committee has had the training, experience and team-building to prepare for the formal interview. Vestry members need opportunities to get to know the candidates. Candidates are gathering and processing information at the same time you are. A mixture of events over a 48-hour period is needed to make a local interview succeed for all persons involved.

- C. Follow-up
1. Committee meets immediately after each candidate's visit. Review not only the local interview, but also your entire history with the candidate. Complete your record of "Evidence this candidate would fulfill the requirements of our position ably."

Commentary: Careful reflection and follow-up on your local interview with each candidate will keep you from pre-judging the outcome.
 2. Maintain regular contact with all local interview candidates until a call has been issued and accepted.

Commentary: Candidates are also reflecting on the local interview experience. It is in everyone's interest to keep in touch during this critical time.

VIII. CHOOSING AND CALLING

Within a very few days of the last local interview (five at most), it is time to decide.

- A. The committee meets to review the evidence on each candidate and to discern who shall be presented to the vestry and how.

Commentary:

Often the weight of evidence concerning one candidate will make your task easy. Or the discernment may be more difficult, in which case your consultant and diocesan deployment officer can suggest methods to help bring clarity. Face-to-face reporting and conversation with all vestry and committee members present allows use of everyone's experience and insight. When the consultant facilitates the report/discussion part of this meeting, wardens and committee chair are free to participate fully.

- B. The vestry meets with the committee to hear, discuss and act on the committee's report.
- C. The vestry resolves that "We intend to elect the Rev. A. B. as Rector of this parish" and notifies the bishop. After the bishop's response, the vestry proceeds with the election and the call.

Commentary: This intention-and-response procedure is required by the Canons of the Church. During this time, it is appropriate to clarify the terms of your intended call with the candidate you have chosen (see IX. Written Agreement).

- D. Keep in touch with your remaining candidate(s) until the call has been definitely accepted. Let all local interview and field visit candidates know your final decision before or at the same time that you make public announcement.

Commentary: Local interview candidates will have a good idea of what is going on. Timely, honest communication honors the candidates and the relationship you have built with them.

- E. Public announcement and celebration!

Commentary: Public announcement should be made on a schedule agreeable to the rector-elect.

IX. WRITTEN AGREEMENT

Although your committee has done the work leading to the vestry's election, your task is not complete until committee and vestry work with the final candidate to clarify the terms of call. It is important to establish the following in the written agreement:

- What the parish expects of the clergyperson
- What the clergyperson expects of the parish
- Plan for periodic mutual ministry review

Commentary:

Verbal agreements concluded by handshake have been the basis of many misunderstandings in clergy/parish relationships. Called to Work Together: A Handbook on Letters of Agreement for Clergy and Congregations by Richard L. Ullman, available from the Church Deployment Office, is a resource widely used to help clarify the terms of a call. Also, Living into our Ministries: The Mutual Ministry Cycle, a Resource Guide by Sam Magill is a publication that can help you establish a healthy review process.

CONGRATULATIONS

The parish position is filled. Your committee has completed its work faithfully and well. The Church Deployment Office and Board offer you their deep gratitude.

We hope it has been a caring, creative and deeply Christian experience for your committee and all the clergy with whom you have come in contact during your calling process. All good wishes for the next few critical months of adjustment and for the good years ahead.

Two good resources for the next few months are:

New Beginnings: The Pastorate Start-up Workbook by Roy M. Oswald. The Alban Institute (1.800.486-1318), 2121 Cooperative Way, Suite 100 Herndon, VA 20171
www.alban.org

Calling Clergy: a Spiritual and Practical Guide Through the Search Process by Elizabeth Rankin Geitz (Transitions Officer/DDO in New Jersey). Church Publishing, Inc. NY NY www.churchpublishing.org/callingclergy

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