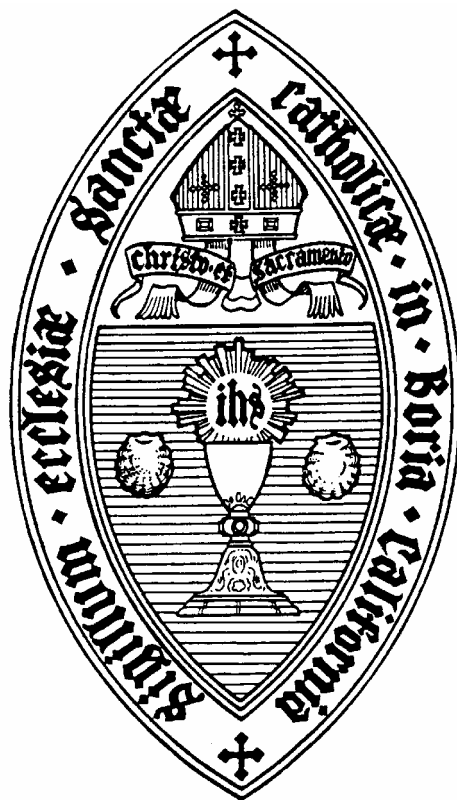


THE CALLING PROCESS



DIOCESE OF NORTHERN CALIFORNIA

- Summary for Congregations
- Complete for Vestry and Committees as needed

RECTOR/VICAR VACANCIES

Long term clergy vacancies in Parishes or Missions are to be expected from time to time in the life of every congregation, and may occur for a number of reasons. Such vacancies are among the most important and far-reaching events in the life of a congregation. Depending upon the reason for the vacancy, most congregations are vulnerable at this time to some degree of anxiety about the future, fear of change, desire for a quick solution, difficult communication and a general lack of focused leadership. It can also be a time of profound spiritual growth in the life of a congregation, a rare chance to clarify a congregation's essential identity and mission apart from any particular clergyperson. It is a time for hope, an opportunity for significant ministry development and widespread renewal of commitment. While the emphasis naturally falls upon calling a new priest, it is equally important that the congregation uses this time to better understand its own call from God, and takes concrete steps to answer that call.

The process takes time, normally not less than a year, and sometimes several months beyond. It is essential that the process be accomplished in a careful manner, and that the congregation not rush to fill the void created by the departure of a priest. It is vital to keep in mind that this is a not primarily a hiring process, but a process of discerning what God is saying to us. The process should involve all members of the congregation and its leaders, the Bishop, the Diocesan Deployment Officer (DDO), and a Facilitator. The congregation normally uses the services of an Interim Priest during the search process to be sure that the pastoral, worship and administrative needs of the congregation are met. The Bishop has the right of appointment, but allows the congregation a final veto. It is a fairly universal policy, and one which our Bishop upholds, that neither the Interim Pastor, long term Supply Priest, nor the Facilitator is an eligible candidate for the vacancy.

The structure and design of the Calling Process is the prerogative of the Bishop and may be modified only by written consent of the Office of the Bishop. The Process currently in use in the Diocese of Northern California, as described in the following pages, is drawn from a number of sources, and takes into account the many canonical, theological, and practical concerns that pertain. It is based upon the experience of numerous persons, and draws upon the accumulated wisdom of many congregations and dioceses. Its purpose is best described in the words of that same prayer which has informed the preparation of this document:

**O God of unchangeable power and eternal light:
look favorably on your whole Church, that wonderful and sacred
mystery; by the effectual working of your providence, carry out in
tranquility the plan of salvation; let the whole world see and know that
things which were cast down are being raised up,
and things which had grown old are being made new,
and that all things are being brought to their perfection by him
through whom all things were made,
your Son Jesus Christ our Lord; who lives and reigns with you,
in the unity of the Holy Spirit, one God, for ever and ever.
Amen.**

[Please note that the calling process has **seven** steps to be undertaken following resignation or retirement of a priest in charge of a congregation, **and that all the steps must be done in proper sequence. Under no condition are any portions of Steps II-VII to be undertaken until after the Rector has actually vacated the position, unless authorized in writing by the Bishop.**]

[In this document, wherever the terms “rector”, “vestry” or “parish” are used, they shall include “vicar”, “mission committee” and “mission”.]

THE CALLING PROCESS

STEP I: NOTIFICATION AND INTERIM SELECTION

(Time Line: one month)

The Bishop and Standing Committee are immediately informed in writing of the resignation or retirement of a priest and a meeting is scheduled between the Vestry and the Bishop as soon as possible. Primary consideration at this time is to be given to the exit of the former rector, the grief process related thereto, and any conflict resolution. The Bishop in consultation with the Vestry will select an Interim Priest to provide sacramental and pastoral services to the parish during the search/calling process.

An Interim Priest helps lead a parish during the time between the end of one rectorship and the start of the next. There are three main types of interim clergy:

Supply Priest...who usually is engaged only to provide leadership for worship.

Priest-in-Charge...who functions with all the authority of a rector or vicar, but does not have tenure.

Interim Pastor...who exercises an intentional transition ministry, supported by specialized training for interim ministry.

Interim clergy do not work with the Vestry or Applicant Review Committee on Calling Process matters, except when the Bishop or Diocesan Deployment Officer specifically so authorizes. Of the three kinds of interim clergy listed above, only Priest-in-Charge may be eligible to be a candidate for rector—long term Supply Priest and Interim Pastor may not.

The Bishop, as rector of congregations without a “settled minister”, may give specific direction as to which of the three types of Interim Priest is most appropriate in a given

situation. The relationship the congregation has with the Interim Priest should be carefully defined and clearly communicated in writing.

(Interim Pastor Letters of Agreement are available from the Office of the Bishop.)

At the initial meeting of Vestry and Bishop, or soon thereafter, the Bishop will inform the Vestry of his appointment of a Calling Process Facilitator. The Facilitator's ministry involves equipping the Vestry and its committees for their work in this process, and generally helping to keep the process moving forward on track. The Facilitator will not serve as a chairperson or chaplain, and will not normally know the identities of applicants. The Senior Warden will contact the Facilitator to arrange an initial meeting with the Vestry, for the purpose of reviewing the Calling Process in detail, organizing the process, exploring a Theology of Call, and otherwise beginning their working relationship.

STEP II: PARISH STATUS REPORT

(Time Line: as required – none suggested)

Following the finalization and approval of an Interim Pastor Letter of Agreement, a written report is made to the Bishop under the supervision of the Senior Warden and approved by the Vestry summarizing the following areas:

- (1) Financial condition of the parish; including clergy and lay staff compensation costs, outstanding debt, mission apportionment payment, pension payments, stewardship, full financial statement of preceding year and current year to date and month;
- (2) The congregation and clergy participation in diocesan life;
- (3) Ministry plan for the interim period, including: pastoral care, sacramental ministry, present staff including clergy and laity, paid and volunteers;
- (4) Status of lay and clergy leadership in the parish, including immediate goals or objectives;
- (5) Ongoing parish programs, relationship to neighboring congregations, the diocese and any ecumenical relationships;
- (6) Any special concerns or problems facing the congregations are to be identified at this time.

During this time the Vestry will meet with the Facilitator for a general orientation to the Calling Process. The Vestry will select a Chaplain for the Calling Process, who is a lay person from the congregation who is given the responsibility to lead prayerful focus and Bible study through all facets of the Calling Process so that discernment, prayer and the theology of a call remain central to the process. Because the Chaplain has special duties to monitor the group process and the right to interrupt deliberations and put the group into prayer, she/he may not be a member of the Profile Committee nor the Applicant Review Committee and may have voice but no vote in any decisions related to the Calling Process. It is also recommended that the Chaplain not be a member of the Vestry; however, should the Vestry choose to appoint one of its members as Chaplain, then it is expressly understood that that person shall abstain from voting throughout the entire process on any matter related to the Call, until after the Letter of Agreement with the new priest has been signed. He/She may have voice, but no vote. The Facilitator will provide the Chaplain with relevant training and resources.

Following receipt of the Bishop's written approval of the Parish Status Report, the

Vestry may begin :

STEP III: DEVELOPMENT OF A PARISH PROFILE

(Time line: three months)

(1) At a meeting with the Bishop, or a person designated by the Bishop, the parish begins to develop the Parish Profile document, which is used to inform prospective applicants about the Parish.

(2) The Vestry oversees the development of the Profile; to this end, it will usually appoint a committee to actually develop the Profile. The Facilitator will advise the Vestry regarding the composition of the Profile Committee.

(3) The Facilitator appointed by the Bishop begins to work with the Profile Committee.

(4) If a survey of the congregation is utilized, the Vestry reviews and approves the format of the profile questionnaire, and forwards the profile questionnaire to the Bishop and Diocesan Deployment Officer for written approval prior to its use. A "town meeting" format may be used in lieu of the written questionnaire to gather input from the congregation.

(5) The Profile Committee shares the final draft of the proposed Profile with the Facilitator. They then forward it to the Vestry, who reviews it with the Facilitator, makes such changes as it deems necessary, and forwards it to the Bishop and Diocesan Deployment Officer for final approval.

(6) After receiving approval of the Parish Profile by the Bishop, it should then be shared with the whole congregation in a significant way; e.g. special parish meeting, potluck dinner, adult education forum, etc., so that they may see the results of their input as a congregation. This sharing is for information only, and not for gathering further input nor making any changes.

MODEL PROFILE OUTLINE

- (1) Letter of introduction explaining why the Profile was developed, who the previous rector was and the circumstances of the rector's leaving;
- (2) Current Vision and Mission Statements and goals;
- (3) History of the congregation and what is unique about this congregation;
- (4) Current programs, organizations and liturgical style; (pictures are encouraged)
- (5) Present staff and their duties, clergy and lay, paid and volunteer, and a brief description of responsibilities;
- (6) Current financial status, including operating budget, treasurer's report and endowments and memorial funds, stewardship report (including number of pledges, total amount pledged and description of stewardship program) and three-year financial history in summary form including details of all outstanding debt;
- (7) Demographics, including number of parishioners; average Sunday attendance, congregational breakdown according to age, occupation, ethnic origin and education, residential patterns, average length of time in the parish and the Episcopal Church, special programs and ministries (Cursillo, prayer groups, meal programs, etc.);
- (8) Description of the surrounding community, including history, demographics, education, school systems, business opportunities, local government and recreation;
- (9) Description of all buildings and present condition, including all property owned by the church (current pictures are required, and a sketch of the church property is helpful);
- (10) Results of the parish survey or "town meetings", including a description of the survey process and a report of the analyzed data;
- (11) Areas of ministry focus and goals (two to six areas), including current emphasis to continue and to build upon; new ventures or desired opportunities for ministries;

(12) Position description for the new rector based on the Church Deployment Office materials, including particular skills or emphasis, responsibilities, and pastoral specialties, with special attention to a narrative description of four major responsibilities or expectations of the new priest.

Sample surveys, town meeting formats, and Parish Profiles are available from the Diocesan Deployment Officer.

STEP IV. DEVELOPMENT OF APPLICANT REVIEW COMMITTEE **DEVELOPMENT OF NOMINEES LIST**

(Time line: three to four months)

- (1) Following the Bishop's written approval of the Parish Profile, the Diocesan Deployment Officer, after consultation with the Vestry, will enter the position with the Episcopal Church's National Church Deployment Office. (On occasion, the Facilitator and the vestry **may** meet to complete the Parish Search Request and Orientation Report for submission to the Church Deployment Office instead of the DDO completing the document.)
- (2) The Vestry selects and directs the Applicant Review Committee, which should include up to two vestry members (other than the Wardens, who are charged with overall supervision and other parish duties). Other persons from the congregation would be added to the AR Committee in order to develop a balanced committee of eight to twelve persons representative of the make-up of the congregation.
- (3) The vestry will develop a clear charge to the AR Committee which includes:
 - (a) The Theology of a Call;
 - (b) Reinforce the role of the Chaplain in the discernment process;
 - (c) The Vestry's expectations for the AR Committee; e.g. number of finalists, ranking, special skills, etc. as reflected in the Search Request and Orientation above;
 - (d) A budget for the AR Committee (Note: Estimated costs of travel, visits, background checks and moving expenses range from \$15,000 to \$25,000).
- (4) The AR Committee will work under the direction of the Facilitator until their field visits begin. The relationship of the AR Committee and the nominees are of great concern, and the following issues are emphasized:

(a) Confidentiality

- (b) Affirmation of the ministry of all nominees
 - (c) Discretion when visiting the nominee's congregation
 - (d) Hospitality and care for the nominees and spouses during visitations
 - (e) Communication with nominees--to be prompt, regular and courteous
- (5) The Facilitator will provide training for the AR Committee in the following areas:
- (a) Standardization of three screening questions;
 - (b) Profile reading and use of résumés;
 - (c) Ten field interview questions for interviews (questions must reflect the profile prepared in Step III);
 - (d) Interviewing (in person and also--optionally--phone);
 - (e) Visits to clergy and at least three references (including Sr. Warden) at their church;
 - (f) Fair presentation of all candidates.
- (6) Simultaneously with the above, the Bishop's office shall be advised of any nominees for the position which may come from parishioners, or letters of interest received by the parish. The AR Committee will inform the Bishop's office of the closing date for receiving nominations (generally 60 days from submission of the CDO Search Request). Their names together with the nominees generated by the CDO Parish/Institution Search Request will be received in the Diocesan Office by the Diocesan Deployment Officer.

For a Parish:

After preliminary screening by the Bishop and Diocesan Deployment Officer, all persons whose names are received from the Church Deployment Office, together with all other persons nominated or expressing interest will be sent a letter from the Office of the Bishop inquiring into their interest. All who respond with a desire to apply will then be sent a

copy of the Parish Profile, together with the 3 screening questions. It is anticipated that the nominees will be allowed approximately thirty days to submit an application. Completed applications, consisting of CDO Profiles, resumes, answers to the screening questions, and references, will then be forwarded by the Diocesan Deployment Officer to the AR Committee. Upon receipt of those files the AR Committee will then move forward to Step V to determine which applicants they wish to become candidates, to visit in the field and to conduct the personal interviews.

(The vestry, by notification of the Bishop, may exercise the option of receiving a list of 6 potentially interested clergy from the Office of the Bishop, and then itself undertaking all subsequent correspondence described above. The AR Committee will then move to Step V to visit and interview candidates in the field.)

For a Mission: The Bishop will generally provide the Mission Committee a list of two persons to be interviewed and selected as Vicar.

STEP V. INITIAL SCREENING AND INTERVIEWS;

(Time line: three to four months)

- (1) The AR Committee will determine the candidates on the list to be interviewed.
- (2) The AR Committee may conduct interviews by telephone or further questionnaires to determine which selected candidates are to be interviewed.
- (3) When the pre-finalists—typically six--have been selected, their names will be given to the Diocesan Deployment Officer who will initiate a more detailed background check (at an estimated cost to the Parish of \$200 per applicant). Although the completion of these background checks typically takes a month or longer, it is recommended that the AR Committee proceed immediately with scheduling visits and conducting field interviews.
- (4) The AR Committee visits the priest's congregation in teams of two and conducts a personal interview, using the same ten interview questions as the Committee developed to be used with each pre-finalist. Supplemental brief on-site interviews must include the Senior Warden, at least two lay members of the congregation and one staff member (if applicable). Visits to all pre-finalists should be made within a period of 30 days if possible.
- (5) The names of final candidates, prayerfully discerned to be the 3 persons best qualified by demonstrated competence (skills and experience) to be called, will be forwarded to the Bishop for final review and approval before being presented to the Vestry.

STEP VI. FINAL INTERVIEWS AND CALL

(Time Line: One Month)

(1) A final list of (typically three) candidates will be sent to the Bishop for final approval and background check. Upon approval by the Bishop, the list will be given to the Vestry for their consideration. Candidates on the final list will:

(a) be invited to visit and be interviewed by the Vestry at the church;

(b) meet with the Bishop; and

(c) meet with local clergy, if possible; and

(d) be apprised of the financial considerations of a Call, including compensation and benefits in detail, in a meeting with the Senior Warden and other leaders. The Vestry will provide to all finalists prior to their arrival a copy of the most recent Diocesan Clergy Compensation Schedule and a copy of the Diocesan Personnel Policies and Procedures, including information about diocesan benefits and sample Letter of Agreement.

(2) The Senior Warden shall arrange with the Bishop the time and place for the final election meeting to be held by the Vestry. The Bishop or his appointed representative will normally be present at that meeting; if they choose not to be, the Warden shall immediately after such meeting communicate to the Bishop the name of the clergyperson who was chosen.

Negotiations are not to commence until written notification of the Bishop's approval is received. (See Canon 37.8 and 37.9)

REMINDERS TO APPLICANT REVIEW COMMITTEES
AND VESTRIES

1. Keep the identities of applicants confidential. (This includes not only their names, but also their parish name and city location.)
2. Candidates may not “audition” in the vacant parish.
3. Be sensitive to the separate role of the clergy spouse; invite, but do not insist upon, their presence/participation.
4. Do not make random phone calls to candidate’s parish or others acquainted with the candidate as this could jeopardize their current position.
5. Spend time with the web site for the candidate’s current parish.
6. Keep in touch with the candidates, informing them of the current status of your process.
7. Keep your congregation informed.
8. Stay in touch with your Facilitator.
9. Stay in touch with the Diocesan Deployment Officer and the Bishop.
10. PRAY REGULARLY for ALL involved in this process!

STEP VII. NEGOTIATIONS/LETTER OF AGREEMENT

(Time Line: One Month)

A Letter of Agreement must be prepared and is subject to final approval by the Bishop prior to the new Rector or Vicar taking office. It should detail the following areas:

- (1) Total Compensation Package (Diocesan standards must be met).
- (2) Vacation/sick days/days off/disability leave
- (3) Continuing education – time/allowance
- (4) Sabbaticals – policies and provisions for funding
- (5) Health insurance/dental insurance
- (6) Moving expenses
- (7) Car/travel allowance/reimbursement
- (8) Relationship to clergy and lay staff, volunteer and salaried
- (9) Expectations of clergy participation in Diocesan life
- (10) Annual mutual review of ministry with a facilitator
- (11) Social Security Payments (considered by Federal law to be salary) are to be included in salary package
- (12) Position descriptions should be developed now describing the role of the rector/vicar and other leadership within the congregation, based in part on the position description from the Parish Profile (see (12) on page 9 of this document). This description becomes a part of the Letter of Agreement.

(Sample Letters of Agreement are available from the Office of the Bishop.)

Checklist for Calling Process

(Do not proceed to next Step without approvals, if required.)

STEP I NOTIFICATION AND INTERIM SELECTION

- ___ Sr. Warden notifies the Bishop and Standing Committee in writing of the vacancy
- ___ Vestry meets with Bishop
- ___ Vestry arranges for interim clergy
- ___ Exit interview with departing rector/vicar
- ___ Sr. Warden contacts Calling Process Facilitator

STEP II PARISH STATUS REPORT

- ___ Vestry meets with Facilitator for orientation training
- ___ Vestry selects Chaplain
- ___ Sr. Warden and Vestry writes and submits Parish Status Report to Bishop
- ___ Vestry receives Bishop's written approval of Parish Status Report

STEP III DEVELOPMENT OF A PARISH PROFILE

- ___ Vestry appoints Parish Profile Committee
- ___ Facilitator meets with Profile Committee
- ___ Profile Committee submits Parish questionnaire to Vestry for approval
- ___ Vestry submits Parish questionnaire to Bishop for approval
- ___ Vestry receives written approval of questionnaire from Bishop to proceed
- ___ Profile Committee shares preliminary draft of Parish Profile with Facilitator
- ___ Profile Committee submits final draft to Vestry
- ___ Vestry reviews final draft of Parish Profile with Facilitator
- ___ Vestry amends (if necessary) and transmits Profile to Bishop for approval
- ___ Vestry receives written approval of Profile from Bishop
- ___ Vestry shares Parish Profile with congregation

STEP IV DEVELOPMENT OF APPLICANT REVIEW COMMITTEE

- ___ Vestry meets with Facilitator, appoints and charters Applicant Review Committee
- ___ AR Committee meets with Facilitator for training, develops 3 screening questions
- ___ AR Committee meets with Facilitator, develops 10 questions for field interviews
- ___ AR Committee meets with Facilitator, practices field interviews

STEP V INITIAL SCREENING AND INTERVIEWS

- ___ AR Committee sends (6) pre-finalists' names to Diocesan Deployment Officer for background checks
- ___ AR Committee visits pre-finalists in pairs, conducts formal interview
- ___ AR Committee forwards names of 3 finalists to Bishop

STEP VI FINAL INTERVIEWS AND CALL

- ___ Vestry receives approved list from Bishop
- ___ Finalists invited for visit
- ___ Vestry conducts formal interview during visit
- ___ Senior Warden discusses compensation and benefits with finalists
- ___ Bishop meets finalists during visit
- ___ Vestry invites Bishop to final election meeting
- ___ Vestry receives Bishop's approval to negotiate

STEP VII NEGOTIATIONS/LETTER OF AGREEMENT

- ___ Bishop reviews and approves Letter of Agreement and Position Description
- ___ Simultaneous announcement of the Call at both parishes
- ___ Exit interview with departing interim clergy
- ___ Formation of Transition Team or assignment of transition functions
- ___ Celebration for all who participated in the Calling Process