



From Rector to Rector

★The Episcopal Diocese of Texas

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SEARCH PROCESS

OVERVIEW

STAGES

PROCESS

ROLES

The process begins with prayer in Jesus' name.

OVERVIEW

PRE-SEARCH

Vestry
Oversight

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ACTIVE SEARCH

Search Committee
Oversight

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THE CALL

Vestry
Oversight

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Congregational Evaluation	Vetting	Informing Candidate
Visioning Event	Committee Work	Candidate's Visit
Profile Committee	Names	Vestry Meeting
Finances	Visits	Acceptance of Call
Rector's Package	Shortening the List	Documents of Call
Search Committee	The Name	Informing Congregation

INTRODUCTION TO THE SEARCH PROCESS

- There is a natural flow of change that begins with the departure of the current Rector and ends with the arrival and incorporation of the new Rector.
- The transition process is the path the congregation takes between rectors.
- It involves the living out of the parish's healthy mission and ministry.
- Depending on a variety of circumstances, the average process can take anywhere from 6 months to 2 years, and can be unnecessarily lengthened when a Search Committee goes astray.

STAGES OF TRANSITION

(Based loosely on Kübler-Ross's stages of grief)

STAGE ONE: LOSS

- Issue: grief
- Emotional Content: sadness, anger and anxiety
- Task: closure and celebration of the past
- Danger: denial, failure to face loss
- Icon: celebration of ministry during Rector's tenure

STAGE TWO: PREPARATION

- Issue: reassessment
- Emotional Content: resolve and anxiety
- Task: a realistic look at the present situation and needs
- Danger: creating the profile of the church that "we wish we were" or "believe we were ten years ago"
- Icon: meet with Rev. Young, hire an interim, take action with pre-search work, and complete the parish profile

STAGE THREE: SEARCH

- Issue: finding the person to lead for the future
- Emotional Content: anticipation and excitement
- Task: finding best leader with right skills to help revitalize sense of identity and mission
- Danger: finding a person as different from the past Rector as possible; placing undue emphasis on skills not offered by the former Rector
- Icon: appointment of Search Committee

STAGE FOUR: CALL/START

- Issue: a "good start"
- Emotional Content: enthusiasm and euphoria
- Task: creating a warm and welcoming atmosphere, setting the tone for the working relationship
- Danger: focusing on new rector/vicar as solution to congregation's problems
- Icon: celebration of new ministry and transition team

STAGE FIVE: ADJUSTMENT

- Issue: reality versus expectations
- Emotional Content: frustration and anger
- Task: come to terms with the reality and extent of change
- Danger: focusing on personality of new rector/vicar or isolated areas of symbolic change
- Icon: first year mutual ministry review and celebration

ROLES IN THE SEARCH PROCESS

VESTRY

- Provides a healthy environment to facilitate the best possible transition between Rector or Vicar leadership
- Is resource to congregation, leading through change
- Leads with vision, mission and values

BISHOP DIOCESAN, THE RT. REV. C. ANDREW DOYLE

- Communicates names for consideration (III.9.3).
 - * Names of nominees must be sent to the “ecclesiastical authority.”
 - * The ecclesiastical authority must be satisfied that the person is duly qualified, duly elected, and upon election has accepted. (III.9.3.3)

DIOCESAN TRANSITION MINISTER, THE REV. FRANCENE YOUNG

- Resource to the congregation’s leadership throughout the search process.
 - * Meets with Vestry soon after Rector’s departure to train and discern pre-search options
 - * Meets with Search Committee before Active Search to orient and conduct STAR training

CANON TO THE ORDINARY, THE REV. CANON KAI RYAN

& CANON FOR CONGREGATIONAL VITALITY, CANON MARY MACGREGOR

- Resources for Vestry and Search Committee, as needed

TREASURER OF THE DIOCESE, BOB BIEHL

- Works with Rev. Young, Senior Warden, and Parish Treasurer to prepare budgets during Pre-Search
- Gives final approval of financial package for next rector

PRE-SEARCH

VESTRY OVERSIGHT

PROFILE COMMITTEE

COMMUNITY PORTFOLIO

CONGREGATIONAL
EVALUATION

SEARCH COMMITTEE

VESTRY WORK

The process continues with faithful prayer.

ORGANIZING FOR SEARCH

The Vestry must consult with the Diocese and become familiar with the timeline for the search process.

CONGREGATIONAL EVALUATION

TRAINING

- Training for Congregational Evaluation will be scheduled shortly after the Vestry meets with Canon Ryan.
- Training will be provided by Canon MacGregor or a consultant of her choosing.

CORE VALUES

- Clergy candidates expect congregation recently has defined or reaffirmed its core values.
- Vestry members, carefully selected ministry heads, leaders & new members (1-3 years) will be a part of this process.

MISSION STATEMENT

- Does a mission statement exist?
- Does the statement reflect the current mission? A review with possible revisions, or the crafting of a new statement will be part of the congregational evaluation work.

VISIONING EVENT

- Canon MacGregor will advise the Vestry on the type of visioning work that needs to be done, depending on work that has been done recently.
- A weekend meeting may be held, with a minimum number of participants equal to 25%

of average Sunday attendance (ASA), and including Vestry members and key parish leaders.

- The objective is to discern vision for immediate future of ministry (1-3 years)
- If congregation has recently established ministry goals, meeting can be shortened just to review goals.

RECTOR PROFILE SURVEY

- Generally, every parish will do a survey with the following objectives:
 - * Generate demographic information about congregation
 - * Identify desired skills, qualities and leadership style needed to lead congregation into fulfillment of its vision and mission
- A rector profile meeting may replace the rector profile survey, with the advice and approval of Canon MacGregor.

RESULTS

- All of the results of the congregational evaluation (core values, mission statement, visioning event, and rector profile survey) will be given to the Profile Committee.

PROFILE COMMITTEE

VESTRY APPOINTS PROFILE COMMITTEE

- Two to four people will be responsible for creating a parish profile for prospective candidates.
 - * The Interim Rector, other clergy, staff members, and the relatives of staff members, vestry, and clergy may not serve on the Profile Committee.
 - * Members of the same family may not serve together on the Profile Committee.
- In addition, the Profile Committee is responsible for drafting answers to narrative questions that will be to be used in the OTM Community Portfolio, created by Canon Ryan's office, on the Office for Transition Ministry's website.
- Vestry must approve final versions of the parish profile and the OTM narrative answers.
 - * Profile & OTM narrative answers must be completed and approved before the Search Committee can be appointed and trained.

PURPOSE OF PROFILE

- Present information to the prospective candidates and community about the church and the profile of the desired rector.
- Should include outline of core values, mission, and vision determined by visioning event & survey.

FINANCES

For assistance with finances, please consult the Diocesan Treasurer, Bob Biehl.

SEARCH BUDGET

- Budget for Interim Rector or Supply Clergy
- Budget for Profile Committee and Search Committee expenses

RECTOR'S FINANCES

- Prior to Active Search, Vestry will develop a minimum clergy compensation package for the new Rector
- Search cannot begin until Diocesan Treasurer approves clergy compensation package
- Senior Warden notifies Search Committee Chair (once selected) that Vestry has approved financial package for new Rector. Until package is completed during Pre-Search, Active Search cannot begin and names of approved candidates will not be given to Search Committee.

NOMINATION FORMS

- Vestry will post the nomination forms for potential Search Committee members and for potential Rector candidates on the parish website, and then communicate to parish the procedure for parishioners to submit nominations.
- Rector candidate nominations will be collected and emailed to Rev. Young.

SEARCH COMMITTEE

FORMING THE SEARCH COMMITTEE

- The Vestry is responsible for electing the Search Committee.
- The Interim Rector, other clergy, staff members, and the relatives or partners of staff members, vestry, and clergy may not serve on the Search Committee or take a role in Active Search.
 - * The Interim Rector may practice interview questions with the Search Committee.
- Members of the same family may not serve together on the Search Committee.

CHARACTERISTICS OF A MEMBER

- Member in good standing who is faithful in regular attendance at worship
- Has served in leadership capacities in various ministries at the church
- Has financially pledged or given regularly to the mission of the church
- Can collaborate with others in decision making and be part of consensus decision making
- Has demonstrated mature commitment to the vision, mission, and values of the church
- Is a person of prayer and faithful living
- Has demonstrated the wisdom and capacity to hold in confidence sensitive information
- Can commit to attendance at frequent meetings for a period of 6-12 months
- Can travel on weekends during this period to prospective candidate's churches
- Willing to perform tasks as determined by the committee including some written work
- Will commit to the work of this group and be accountable for assigned responsibilities

COMPOSITION OF THE SEARCH COMMITTEE

- Seven to twelve diverse members, including representation (2 or 3) from Vestry (do not appoint alternates)
- Senior Warden serves as *ex officio* and attends committee meetings and all trainings. Has no contact with candidates; no visits; no vote.
- Committee Chair chosen by Search Committee from among its members
- Search Committee Commissioning at Sunday service prior to STAR Training
- Senior Warden will provide Search Committee roster & contact info for the Search Chair to Transition Team Assistant, Sara Myers, as soon as the Search Chair has been selected

STAR TRAINING

- STAR (Situation, Task, Action, Result) interview training by trainer designated by the Diocese
- Search Committee prepares STAR questions

SEARCH COMMITTEE TEAMS

- It is advantageous for a Search Committee to divide into teams. Teams always are recommended, but should not be designated until after STAR training.
- Team membership is flexible according to availability for travel.
- Reasons for using teams
 - * facilitates consensus building
 - * spreads out travel responsibilities
 - * better utilizes each member's gifts and strengths.

SEGUE TO ACTIVE SEARCH

- Search Committee meets with Rev. Young immediately prior to Active Search

VESTRY WORK DURING PRE-SEARCH

✝ Lead through the change

✝ Responsible for Pre-Search process:

- * Vision, Mission, Values and Strategy

✝ Before Active Search begins, Vestry must

- * Prepare budgets for
 - Interim Rector or supply clergy
 - Profile Committee
 - Search Committee
 - Financial package for Rector
- * Finalize package for new Rector and email to Rev. Young
- * Take nominations for potential Search Committee members & Rector candidates
- * Post parish profile on church's website
- * Select & commission Search Committee

ACTIVE SEARCH

SEARCH COMMITTEE OVERSIGHT

CANDIDATES FOR SEARCH

WORK OF SEARCH COMMITTEE

NAMES OF CLERGY CANDIDATES

VESTRY WORK

The search moves forward with fervent prayer.

CANDIDATES FOR SEARCH

- Candidates come from an ample number of Episcopal clergy in the Diocese of Texas and the Episcopal Church
- Focus for Search Committee is to find next Rector for the parish

NAMES OF CLERGY CANDIDATES

- Names are gathered from various sources:
 - a) Candidates may self-refer.
 - b) Candidates are recommended by parishioners.
 - c) Candidates may be recommended by others, apart from the parish.
 - d) Bishops and Canons may recommend names.
- Names can continue to be gathered during the time frame of the search. It is not unusual to add names well after the search begins.
- Bishop Doyle approves all candidates before the Search Committee may initiate contact with them.

NAMES AND PORTFOLIOS

- Rev. Young will email to the Search Committee Chair the list of names that Bishop Doyle approves, together with candidates' Office of Transition Ministry (OTM) Portfolios and resumes, as available.
- A sample Personal OTM Portfolio is available.

WORK OF SEARCH COMMITTEE

(Please note page 7 about Search Committee Teams)

KEEPING THE CONGREGATION INFORMED

- Throughout the search process communication is essential, while maintaining discretion. The Search Committee informs the congregation about general progress of the search process.
- During Active Search, one Search Committee member serves as communication coordinator & regularly shares information with congregation.
- Keeping the congregation informed (emails, tweets, announcements, newsletters, etc.) builds trust in the Search Committee's work & progress.
- Names of candidates are kept confidential. Confidentiality is essential for the Search Committee's deliberations. (See Confidentiality document.)

SENDING THE PROFILE TO CANDIDATES

- When Search Committee receives Bishop Doyle's approved list of candidates with portfolios, Search Committee reviews list & places an initial call and/or sends a letter of introduction and parish profile by email to the candidates they wish to consider.
- After emailing the profile, Search Chair calls the candidates within several days. If a candidate is interested, a visit or an initial video conference (such as Skype) is scheduled.
- Search Committee may ask for resumes from candidates and also request that the OTM Portfolio be completed.
- The Search Committee is encouraged not to eliminate any candidates recommended by the Bishop without being interviewed by a Search Committee Team.
- Additional material, i.e. sermon links, may be requested by Search Committee.

VISITS

- **IMPORTANT! GO VISIT!** Get on site as soon as possible.
- If preliminary video conference interviews are desired, please contact Rev. Young for guidance.
- STAR questions for the interviews must be prepared in advance of the visit.
- The Search Committee team (see page 7) goes for a Saturday visit. It is important to divide the visit into formal and informal sessions. Formal sessions must take place in a neutral location other than the candidate's home or local parish.
- Make certain to include the spouse in an informal session, which often is best achieved during a meal at a nice, quiet restaurant.
- If distance is a factor, plan for the team to stay overnight in a hotel before attending Sunday services. Don't sit together at the service because teams can be conspicuous to the congregation. Divide team presence in order to attend all Sunday services. Upon

completion of the visit, team will debrief the interview within several days to share thoughts and record responses for future reference.

- A sample schedule is available in STAR notebook and on Basecamp.

INTERVIEWS

- Use the STAR process as taught by Rev. Young
- Refer to the Social Media Guidelines document.
- The clergy's spouse is not to attend the formal interview sessions.
- Do not interview children of clergy. Offer to pay for babysitting, if needed.

SECOND VISITS

- If committee desires a second visit to a candidate, another team will go. The first team should review observations with the second team in order to clarify information for the second interview.
- A second visit may necessitate the Candidate's visiting the Search Committee's city. If so, it needs to be a stealth visit.
 - * It is extremely important that the Candidate not attend Sunday worship or meet with anyone other than Search Committee members.

KEEP CANDIDATE CONNECTED AND INFORMED

- The Search Chair or a designated "shepherd" should contact each candidate regularly; every two to four weeks.

SHORTENING THE LIST

- There is no minimum number of candidates to visit and interview. Except in rare circumstances, more than one candidate should be interviewed.
- It is a natural process for the committee to eliminate candidates from the list. Reducing the number of candidates to several qualified candidates happens naturally and easily.
- Moving toward "the one"
 - * Refer back to rector profile and congregations' mission, vision, & values
 - * Compare ratings from STAR questions
 - * Listen to one another and pray
- A member of the Search Committee makes a personal phone call to notify each candidate as soon as their name is eliminated.
 - * Thank them for engaging in the process.
 - * Tell them the Search Committee has chosen to move forward in a different direction.
 - * Assure them of God's blessings as they seek calls to new ministries.
- The only names to keep at the end are the top two or three. Only after the new Rector

accepts the call will the one or two not chosen be notified.

VETTING, REFERENCE CHECKS, AND BACKGROUND CHECKS

Vetting:

- Done by Bishop's Office - Checks for Red Flags and issues of general acceptability for service in the Diocese of Texas and in the type of setting.
- Completed prior to any contact between the Search Committee and candidate (before name is given to the Search Committee).

Reference Checks:

- Done by members of the Search Committee, generally when list is narrowed to two or three, but always before the name of the candidate is recommended to the Vestry by the Search Committee.
- Goal is to assess the gifts and weaknesses of candidate for your setting and congregation; and to check whether candidate's self-perception is shared by others who have experienced his or her work.
- Any Red Flags that come up in reference checks must be brought to the attention of Rev. Young for further investigation.

Background Checks:

- Background checks (on clergy from outside EDOT and EDOT clergy whose last check is more than 5 years old) are conducted when the list is narrowed to one or two. It takes approximately one month to conduct a background check.
- Search Committee requests background checks via Rev. Young

FINAL STAGE OF THE SEARCH

- The final stage of selecting a nominee is one of close scrutiny, prayer and reflection.
- Once the Search Committee comes to consensus on whom it will recommend as the next Rector of the parish, the name is presented to the Vestry for consideration.
- Search Chair informs Rev. Young, who informs Canon Ryan.
- Search Committee prepares a significant presentation about the candidate to present to the Vestry.
 - * Gives reasons for nomination of Candidate
 - * Provides helpful information, as Candidate's OTM Portfolio

VESTRY WORK DURING ACTIVE SEARCH

- ✝ Lead through the change
- ✝ Responsible for seeing that Search Committee communicates well with congregation
- ✝ Must make certain that funds are available to Search Committee's work
- ✝ Ensure stability and continued ministry of congregation
- ✝ Set goals and celebrate accomplishments
- ✝ Support Search Committee with prayer
- ✝ Model and encourage the congregation's support of the Search Committee, especially in the need for confidentiality.

THE CALL

VESTRY OVERSIGHT

VESTRY MEETING

THE CANDIDATE'S VISIT

INFORMING THE CANDIDATE & CANON RYAN

ACCEPTANCE OF CALL

VESTRY WORK

Prayers center on listening to God's call.

VESTRY MEETING

- When the Search Committee is ready to recommend a candidate and present it to the Vestry, the Senior Warden calls a Vestry meeting for that purpose.
- The Vestry and Search Committee attend

THE DECISION

- Search Committee presents Candidate's name to Vestry
- Answers Vestry's questions, then is recused from the meeting
- Vestry's decision made in Executive Session, because the business is a confidential personnel matter.
- Election of Candidate is solely a Vestry decision
- Call Search Committee back in after vote

INFORMING THE CANDIDATE AND THE DIOCESAN TRANSITION MINISTER

- Upon candidate election, the Senior Warden calls the Candidate to tell the priest of the election, then invites the Candidate and family to visit the parish setting and negotiate package
- Immediately following, the Senior Warden communicates news of the election to Rev. Young, who will inform Canon Ryan.

THE CANDIDATE'S VISIT

At the first opportunity, the Senior Warden and the chair of the Search Committee bring the Candidate for a visit.

- This visit is not a public event. It is to take place during the week and will include a meeting with the Vestry.
 - * Other meetings will be at the request of the Candidate. It is usual for the Candidate to meet with staff members, including the head of school if there is one, and key ministry leaders.
 - * There shall not be public introductions or occasions.
- A meeting is arranged for the Candidate, Senior Warden and Parish Treasurer to negotiate the compensation package, which was approved during Pre-Search Phase.
 - * All compensation agreements must be finalized before call is accepted.
- Housing can be explored, including time to meet with realtor & look at houses.
 - * The Candidate may request information about other items of interest (schools, employment opportunities for spouse, etc.).
- Groups of two or three may share meals with the Candidate and Spouse during the visit. Time is set apart in the schedule for Candidate (& Spouse) to have private discussion and reflection.

END OF CANDIDATE'S VISIT

- Usually a social event for Candidate (and Spouse), Vestry, Search Committee and spouses. Negotiations do not include spouses.
- Before visit concludes, Senior Warden and Candidate agree on when the Vestry may expect to hear Candidate's decision.

ACCEPTANCE OF CALL

- Remaining Candidates still on Search Committee's list should not be informed until after the Candidate formally accepts call. Then the remaining candidates must be notified as soon as possible (before public announcements).
- No announcement to the congregation is made until the Candidate formally accepts the call extended by the Vestry and announces the call to his or her current congregation.
 - a) The initial announcement is not made at Sunday Services.
 - b) To announce the call of the new Rector, the Senior Warden sends an email to the parish on the same date the Candidate notifies his/her parish.
 - c) At that time, announcements are posted on the two parish websites.

DOCUMENTS OF CALL







Please obtain templates from Transition Team Assistant, Sara Myers

- Official Letter of Call
 - * Please use diocesan template
 - * Signed by Senior Warden on behalf of Vestry or Bishop's Committee
 - * Includes financial agreements for stipend, housing, social security, pension, and moving expenses
 - * Includes the "effective date" of rectorship. This date reflects when new Rector is placed on payroll, even though duties may begin at a later time.
 - * Must be approved by Canon Ryan
- Letter of Agreement
 - * Please use diocesan template
 - * Between Rector and Vestry
 - * Occasionally requires addition of special agreements (military service, continued work on DMin, tuition allowances for children to attend parish school, etc.)
 - * Signed by all parties, including Canon Ryan

COMMUNICATING CALL TO THE BISHOP

- When call is accepted, Senior Warden forwards signed copies of the Letter of Call and Letter of Agreement to Transition Team Assistant, Sara Myers, who will forward them Canon Ryan and Bishop Doyle.

VESTRY WORK DURING THE CALL

-  Lead through the change
-  Invite Candidate to visit
-  Offer and negotiate financial package
-  See that canonical documents are prepared
-  Notify Bishop
-  Plan celebration of new ministry and transition

CONTACTS

CONTACTS

- **EPISCOPAL DIOCESE OF TEXAS** - Houston, 800-318-4452 or 713-520-6444
Austin, 800-947-0580 or 512-478-0580
Tyler, 888-579-6012 or 903-579-6012
www.epicenter.org
- **The Rt. Rev. C. Andrew “Andy” Doyle**, Bishop of Texas, adoyle@epicenter.org
 - * **Stephanie Taylor**, Assistant to Bishop of Texas, staylor@epicenter.org
- **The Rev. Canon Kathryn M. “Kai” Ryan**, Canon to the Ordinary & Chief Operating Officer, kryan@epicenter.org
- **The Rev. Francene Young**, Diocesan Transition Minister, fyoung@epicenter.org
 - * **Sara Myers**, Assistant to Canon to the Ordinary & Transition Team, smyers@epicenter.org
- **Canon Mary MacGregor**, Canon for Congregational Vitality, mary@epicenter.org
 - * **Julie Heath**, Assistant to Congregational Vitality, jheath@epicenter.org
- **Robert J. Biehl**, Chief Financial Officer & Treasurer, rbiehl@epicenter.org
- **Debra Klinger**, Benefits and Insurance Coordinator, dklinger@epicenter.org
- **Carol Barnwell**, Director of Communication, cbarnwell@epicenter.org

NOTES

MISSION AND MINISTRY EPISCOPAL DIOCESE OF TEXAS

*Grounded in Response to the
Baptismal Covenant and Great Commission*

Core Values

- **Missionary Emphasis** - Making Jesus Christ known with a missionary spirit that honors the heritage of growth and expansion
- **Education and Leadership** - Forming disciples, both lay and clergy, to be effective agents of transformation
- **Meeting Human Needs** - Bringing the love of Christ to a hurting world
- **Responsive Stewardship** - Caring for and dedicating abundant resources to support the mission of the Church
- **Excellence** - Setting a standard for ministry driven by miraculous expectation

