

**DIOCESE OF PENNSYLVANIA
PROTOCOL FOR A SEARCH PROCESS
IN MISSIONS AND PARISHES**

1. After consultation with the Bishop, a Rector/Vicar should provide a Letter of Resignation to the Bishop as well as the Vestry/Bishop's Committee, usually three to four months prior to the end of his/her ministry in the congregation.
2. A meeting will take place (either on site at the parish/mission or at the Diocesan Offices). Those present at the meeting will be the Bishop or Canon to the Ordinary, Canon for Transition Ministry, Wardens of the congregation and members of the Vestry/Bishop's Committee. This meeting will:
 - a. Introduce the leaders of the congregation to the process for the call of a Rector or the appointment of a Vicar by the Bishop;
 - b. Suggest the Vestry/Bishop's Committee engage a diocesan recommended Search Consultant as soon as possible. Candidates for Search Consultant will be suggested by the Canon for Transition Ministry.
 - c. Discuss the timing of the appointment of a Search Committee;
 - d. Describe the composition of the Search Committee, which in most cases will include one or two members of the Vestry/Bishop's Committee. but usually will not include Wardens.
 - e. Outline the responsibilities of the Search Committee during the search process for a new Rector/Vicar;
 - f. Plan a subsequent presentation to the congregation to ensure that the materials covered for the leadership are conveyed to the congregation; and
 - g. Specify the interim period, which will last a minimum of 9 months and a maximum of 18 months.
3. At the beginning of the interim period, when possible:
 - a. The Bishop will present two or three names of candidates for Interim/Priest-in-Charge to the Vestry/ Bishop's Committee for its consideration. Training in interim ministry will be an important consideration.
 - b. The Vestry/Bishop's Committee will interview candidates and will nominate one candidate for Interim or Priest-in-Charge to the Bishop.
 - c. The Bishop will appoints the Interim/PIC.
 - d. Once the Bishop has made the appointment, a Letter of Agreement will be signed by the Bishop, Wardens and Interim/PIC. The Letter of Agreement shall clearly establish the Interim/PIC's tenure (typically one year), salary package, and the sacramental and pastoral ministry responsibilities in the congregation.
 - e. The Interim/Priest in Charge will not be eligible for consideration for the Rector/Vicar position.
4. Approximately 1 to 3 months into the interim period, the congregational leadership will contact the Canon for Congregational Development to schedule a 3-day *Mission and Ministry Envisioning Retreat* for the congregation. The Canon for Congregational Development will assign a Congregation Support Team to lead the retreat.
 - a. The retreat will begin with a Friday evening session, and continue with Saturday sessions designed to:
 - i. Assist the entire congregation in understanding the search process,
 - ii. Begin to gather data to inform a profile,

- iii. Initiate a discussion of a three-to-five-year plan for the congregation.
 - b. The weekend will conclude with worship on Sunday morning.
 - c. Within two weeks of the retreat, a report on the MME Retreat will be forwarded by the Congregation Support Team to the Canon for Congregational Development and to the congregation leadership with the request that the report be published for the congregation.
- 5. After the MME Retreat the congregation will begin the search process. The Vestry/Bishop's Committee will meet with the Diocesan Canon for Transition Ministry to examine the forthcoming search process and calendar.
- 6. The Vestry/Bishop's Committee will appoint the Search Committee and appoint its convener/chairperson. The number of committee members should reflect the size of the congregation. Committees of large congregations would number seven to nine, and in small congregations the committee would number five to seven members.

The tasks of the Search Committee will be:

 - a. Provide a list of names and contact information of the Search Committee members to the Canon for Transition Ministry and decide on the primary contact person.
 - b. Based on the MME Retreat materials, assess the ministries of the congregation, and determine the needs and desires of the congregation (usually through a survey or an all-parish discernment meeting).
 - c. Draft the Community Ministry Portfolio for the Office of Transitional Ministry of The Episcopal Church and draft a separate Parish/Mission Profile that describes the parish's history, ministries, finances, challenges and opportunities.
 - i. The Parish/Mission Profile and OTM form should communicate the identity of the congregation, the community and its state of being, as well as the qualities sought in a new Rector/Vicar;
 - ii. The Search Committee should draft answers to the OTM discernment questions to provide content for the narrative section of the OTM form;
 - iii. The Search Committee should have the Vestry complete the section of the OTM on salary and benefits for the new Rector/Vicar.
 - iv. The Search Committee should write a description of the position to be applied for not longer than 999 characters for posting with the Episcopal News Service and Transition Ministry Conference Newsletter.
 - v. When completed, the Parish/Mission Profile, OTM Community Ministry Portfolio and Rector/Vicar Position Description must be approved by the Vestry/Bishop's Committee.
 - d. The Parish/Mission Profile, OTM Community Ministry Portfolio and the Rector/Vicar Position Description must then be reviewed and approved by the Canon for Transition Ministry and the Bishop. Once approved:
 - i. The Position Description will be posted on the Diocese of Pennsylvania website, ENS and Transition Ministry Conference Newsletter and forwarded to The Episcopal Church Website.
 - ii. The OTM Community Ministry Portfolio form for the OTM Office of the Episcopal Church will be completed online by the Canon for Transition Ministry
 - iii. The Parish/Mission Profile may then be posted on the parish website.
 - e. Applications will be accepted through the Diocesan Transition Office and also may be received directly by the Search Committee.

- i. Clergy will be encouraged to forward their CV and OTM profile with a cover letter to the Diocesan office. Once the file is complete, it will be forwarded to the Search Committee.
 - ii. Search Committees may also accept applications directly. Once the file is complete (cover letter, CV and OTM), it will be forwarded to the Canon for Transition Ministry.
 - iii. Arrangements should be made to keep applicants aware of their status in the process as it progresses.
 - f. As likely candidates are identified, the Search Committee should request an initial “red flag check” with the Canon for Transition Ministry prior to initiating the interview process.
7. The task of the Search Committee is to come to agreement on a single candidate to be nominated to the Vestry/Bishop’s Committee. The suggested review/interview process follows a sequence:
- a. Review of applications (cover letter, CV, OTM Portfolio)
 - b. Telephone/Skype interviews.
 - c. Telephone reference checks on all candidates being considered for site visits to their home parishes or being considered for local site visits.
 - d. (Optional) Many search committees conduct site visits to candidate's parishes at this stage to hear them preach and to talk with wardens and lay leaders.
 - e. As many as three candidates may be invited to make a local site visit to the parish/mission. Before a local site visit is arranged for any candidate:
 - i. The Search Committee will request a “bishop-to-bishop” check on the candidate.
 - ii. A recent Oxford Document Check (background check) for the candidate is received by the Canon for Transition Ministry.
 - 1. Clergy not canonically resident in The Diocese of Pennsylvania will be required to have forwarded to the Canon for Transition Ministry a recent Oxford background check.
 - 2. If no recent Oxford Check is available, the Oxford background check is initiated with the assistance of the Canon for Transition Ministry. The cost of the background check will be paid for by the congregation.
 - f. Once a candidate is cleared by the Bishop, the local site visit may be arranged. Additionally, if possible, an appointment should be made for the candidate to meet the bishop as part of the site visit.
 - g. The Vestry/Bishop’s Committee should be included in a “meet and greet” session with the candidate to maximize the time on site. The Search Committee conducts the interview process, and members of the Vestry/Bishop’s Committee may be present. Often an informal Eucharist with Homily conducted by the candidate for Vestry/Bishop's Committee and Search Committee members (only) is a part of the site visit.
 - h. This process is followed for subsequent candidates.
 - i. The Search Committee nominates one candidate to the Vestry/Bishop's Committee to be called as Rector/Vicar.
 - i. The Vestry/Bishop’s Committee must decide whether to accept or reject the nomination.
 - ii. If the nomination is rejected, the Search Committee resumes the process.
 - iii. If the nomination is accepted, the Canon for Transition Ministry is informed of the selection.

8. Following the decision of the Vestry/Bishop's Committee to call a Rector/Vicar
 - a. A Letter of Agreement shall be drafted, signed, and approved by the Bishop. The Canon for Transition Ministry will provide a template for the L of A.
 - b. When the Letter of Agreement has been approved by the Bishop, the Vestry/Bishop's Committee may publicly announce the call of the new Rector/appointment of the new Vicar.
9. The Search Committee chair should assemble a report on the search process, including evaluations of all candidates, and provide the report to the Canon for Transition Ministry.
10. Following the call of a Rector/appointment of a Vicar, the Bishop will join the congregation for the Celebration of New Ministry (BCP 557).

Approximate Timetable

Rector/Vicar departs
 Vestry notifies Bishop and CTM
 Bishop nominates, Vestry selects, Bishop appoints Interim/PIC -- 1-2 months
 Mission and Ministry Envisioning Retreat – 2-3 months
 Report on MME Retreat from Congregational Support Team to congregational leadership
 Vestry/Bishop's Committee meets with Canon for Transition Ministry – 2-3 months
 Search Committee Appointed--3 months
 Congregation surveyed or all parish discernment meeting -- 3-4 months
 Parish Profile, OTM Portfolio, Position Description written, approved by Bishop, and posted – 5-6 months
 Applications received – 7-8 months
 Initial "red flag" check with Canon for Transition Ministry -- 8 months
 Skype or phone interviews -- 9 months
 Reference checks prior to site visits
 Canon for Transition Ministry reference checks with counterparts in other dioceses
 (Optional) Site visits may be made to 3-6 candidates' home parishes -- 10 months
 Bishop receives names for review of 1-3 finalists to be invited to make local site visits -- 11 months
 Bishop to Bishop reference checks on all finalists invited to make local site visits
 Oxford document check on all finalists invited to make local site visits.
 Bishop approves finalists invited to make local site visits
 1-3 finalists make local site visits -- 11-12 months
 Search Committee nominates one candidate to Vestry/Bishop's Committee
 Vestry/Bishop's Committee calls Rector/Vicar – 12 months
 Letter of Agreement drafted by Vestry
 Letter of Agreement approved by Bishop
 Announcement of call of new Rector/Vicar
 Celebration of New Ministry – 12-13 months