

# Checklist for Congregational Transitions

Created June 2023

## Departing Clergy Stage

- Departing Clergy meet with Canon Anita for an exit interview session, review “Leaving a Congregation Well” guidelines, and inform Canon regarding final Sunday worship, vacation days, and final day of on-site work.
- Departing Clergy coordinate their departure dates and provide completed CPG forms to Clariassa Ortiz in the Diocesan Office for CPG requirements and benefits issues.
- Canon Anita brings a Letter of Gratitude from the Bishop for the Rector/Vicar’s last Sunday (when schedule permits)

## Preliminary Stage

- Bishop and Canon Anita seek possibilities for Interim clergy, if available.
- Canon Anita meets with the Senior Warden to discuss the overall Search process and provide the checklist.
- Canon Anita meets with the Vestry/Bishop’s Committee to review the search process and discuss a possible Interim priest/Search Consultant.
- Vestry/Bishop’s Committee interviews candidates for the position of Search Consultant, if available.
- *If there is going to be a Search Consultant, the Search Consultant's Letter of Agreement is signed.*
- If available, the Vestry/Bishop’s Committee will interview the Interim; Canon Anita will negotiate the Letter of Agreement for the Interim Rector/Vicar.
- Day of Discovery led by Canon Anita or Search Consultant

## Building Portfolio Stage

- The Vestry/ Bishop’s Committee appoints a Search Committee based on the results of the Day of Discovery, the diversity of leadership, and the gifts needed for the Committee.
- Canon Anita/Search Consultant meets with the Search Committee regarding the parish profile, narrative questions, interview questions, and reading OTM profiles.
- Vestry provides the Total Compensation (stipend and housing allowance), determines Travel expenses, Continuing Education allowance, Professional Development, etc., and agrees on how long the position will be open for receiving names.
- Search Committee drafts Parish Profile and Office of Transition Ministry Profile—draft sent to Canon Anita for recommendations.
- The Vestry/Bishop's Committee approves the Parish Profile and OTM profile, along with compensation for the position; the Vestry decides whether to pay for additional visibility via Episcopal News Service, *the Living Church*, or other means.
- Canon Anita approves the Parish Profile, OTM profile, and compensation.
- OTM and Profile are uploaded to the Office of Transition Database

- Canon Anita sends the “Questions not to ask candidates” guideline; the Search Committee formulates questions they want to ask candidates. Search Consultants can work with the Search Committee in this area.

### Receiving Names stage

- Candidates send materials to Canon to the Ordinary
- Canon Anita does “red flag checks” on candidates from outside Arizona
- *If there is not a robust response, Canon Anita consults with the Senior Warden about extending the Receiving Names phase*
- Applicants’ materials are given to the Search Committee. The Search Committee manages communication with the candidates. If a candidate is not moving forward in the process, a member of the Committee or the Chair needs to contact the candidates.
- Canon Anita, or the Search Consultant, provides information about how to read the OTM priest profile to the Search Committee. The committee prepares their questions for the interview process.
- The Vestry/Bishop’s Committee is considering doing a Vestry Enhancement Workshop to prepare for interviewing final candidates.

### Discernment Phase

- The Search Committee reviews materials and determines which candidates to interview via Zoom.
- The Search Committee interviews candidates via Zoom, evaluating candidates for skills and competencies.
- The Search Committee sends up to three candidates to the Vestry for an in-person interview. **AT THE SAME TIME, the Senior Warden lets Canon Anita know they have received the names of finalists, and the Senior Warden emails Serrena Fuentes at [serrena@azdiocese.org](mailto:serrena@azdiocese.org) to coordinate candidate interviews with Bishop Reddall.**
- **An Oxford background check is conducted with finalists unless one has been completed within the last five years. We will obtain a copy of the last known background check from the prior diocese.**
- Canon Anita sends a sample Letter of Agreement to Vestry to familiarize them with its content and answer their questions.
- Vestry interviews finalists for a three-day visit: time for Vestry interviews, a tour of the church, and exploration of the church neighborhood and potential living situations, as well as an interview with the Bishop. Vestry should be prepared to go over the compensation package with each candidate. The Vestry interviews for leadership style, pastoral care style, and generally whether the candidate is a good fit for the congregation.
- If the Vestry votes to call a candidate, the Senior Warden immediately calls Bishop Reddall with the name and phone number of the candidate, as well as the starting salary offer.
- If the candidate accepts, Canon Anita begins negotiating the Letter of Agreement.
- If the candidate does not accept, Canon Anita meets with the Senior Warden about reopening the search.

## **Final Stage**

- After all parties sign the Letter of Agreement, announcements are coordinated between the Rector-Elect and the Congregation so that everyone hears about it at the same time.
- Once the Letter of Agreement is signed, a notification to the congregation(s) needs to take place within fourteen (14) days, and a notification by email needs to be sent to Canon Anita Braden regarding the announcement. The notice will then proceed to the Director of Communications and IT, Laurel Way for placement in the E-pistle for the Diocesan announcement.