

EDOW Transition Model

Current Realities

Availability of Clergy (Interim and Rector)

The Priest pool of potential candidates has dwindled due to several reasons including retirement, prolonged illnesses, and death. Further, the impact of COVID prompted many priests to hasten their retirement date which hurled many parishes into a premature state of transition. Further, newly ordained priests are not necessarily discerning a call to the parish ministry, but rather to chaplaincy roles, not-for-profit work, or teaching in the academy.

Time is of the essence, for we no longer have the luxury of extended periods of time for the search process. As there are many more parishes in transition than available Priests, it is a Priest's market. Therefore, the search process must be conducted in the most time efficient manner. When qualified skilled candidates are identified, you must quickly act; else the Priest may be called to another parish and no longer be available.

Availability of Financial Resources

Some parishes have experienced financial challenges for quite some time; not being able to provide and sustain compensation for a settled Rector and leaning upon supply priests to keep them afloat. Consequently, some parish financial profiles have shifted in a negative direction and the viability of the parish within the context of financial sustainability has been placed in the space of great concern.

Therefore, former approaches of engaging the Search process have been modified to address these current realities.

The newly proposed Search process seeks to ...

Simplify the process – Historically, the Search process has been perceived as an overwhelming and daunting task. Sometimes, this has been primarily due to the nature of the process and the roles of those engaged in the process not being fully understood. This new Search process provides clearly defined sequential tasks and

clearly defined roles and responsibilities for all involved in the process. This further supports the need for confidentiality throughout the process.

Streamline the process – In the initial phase of clergy transition, there is a natural tendency for parishioners to quickly focus their attention upon their desired characteristics of the new rector. While there is most definitely an appropriate space for this energy, the initial focus is more constructively guided toward enabling the parish to clearly articulate their identity, for this will further ensure that the newly called rector possesses the skillset to *meet the parishioners where they are*.

Shorten the process – The new Search process will be conducted by the Vestry in collaboration with diocesan assigned facilitators so that major process outcome deliverables are developed with completeness, conciseness, and correctness. The Vestry will be supported consistently and continuously by diocesan assigned facilitators. *This is similar to having consulting at no charge. * As the final call is made by the Vestry, the process, through intentional diocesan support, equips, enlightens, empowers, and encourages the Vestry to perform these tasks. AND the process is intentional about engaging parishioners to provide their input towards the development of the Search process documents. Again, to shorten the Search process, the Search process will be conducted by the Vestry, not by a separate Search Committee.

Diocesan Assigned Facilitators to support the Vestry:

- **Finance Committee Team** (chaired by [Canon Andrew Walter](#), Canon to the Ordinary and Chief of Staff)
- **Parish Vitality Assessment Team** (chaired by [Canon Anne-Marie Jeffrey](#), Canon for Congregational Vitality)
- **OTM Parish Profile Team** (chaired by [Canon Robert Phillips](#), Canon for Leadership Development and Congregational Care)

In this document, you will find:

- [Transition Model Steps](#)
- [Appendix A](#)
- [Appendix B](#)
- [Appendix C](#)
- [Appendix D](#)

For further information and guidance about the transition model, please contact the [Rev. Dr. Robert Phillips](#), Canon for Leadership Development and Congregational Care

Transition Model Steps

Step 1 – Scheduling of Supply Clergy.

Step 2 – Transition Officer Meeting with Vestry and subsequently with Parishioners (Town Hall).

Step 3 – Financial Review – in consultation with the Finance Committee Team Facilitator including Wardens and Treasurer (remainder of Vestry optional) (1-2 weeks).

4 “Prongs”

- Prong 1 – Conducting of current Financial Audit by outside organization.
- Prong 2 – Ability to meet expenditures (APPENDIX A).
- Prong 3 – Compensation Package details (APPENDIX A).
- Prong 4 – Job Description (detailed) (APPENDIX B) to ensure clergy expectations and compensation package are in sync.

Step 4 – Parish Vitality Assessment – in consultation with the Parish Vitality Assessment Team Facilitator (See APPENDIX C) (6-8 weeks).

- Determine the most effective instrument(s) to gather information from parishioners.
- Use instrument(s) to gather information from parishioners.
- Assign Vestry member(s) to each Vital Sign for synthesis of parishioner responses.
- Review synthesized responses with Vestry.

Step 5 – Website Review (1 week).

- High level review of the website to determine consistency of that which was discussed in the Parish Vitality Assessment is referenced on the website.

Step 6 – Parish OTM (Office of Transition Ministry) Profile - in consultation with the OTM Parish Profile Team Facilitator (See APPENDIX D) (4-6 weeks).

- The 11 Narrative Questions from the Parish Profile.
- A suggested instrument to gather this information is the actual distribution of the 11 Narrative Questions.
- Assign Vestry member(s) to each Narrative Question for synthesis of parishioner responses.
- Review synthesized responses with Vestry.

Step 7 – Complete OTM Parish Profile (including Basic Information, Work History and Skills, Connections, References, etc.). Upon completion, contact Executive Assistant to the Canons, Allen Fitzpatrick (afitzpatrick@edow.org) to upload to the OTM database.

Post on Episcopal News Service ...

[This link](#) takes you to the jobs page. There is a Submit a Job link to the form for posting. Once received, the contact is sent an email confirming the posting and suggesting additional services.

Post on EDOW website ... Go to EDOW.org under Resources/Employment/[Job Openings](#) There is a link in the first paragraph to a form that needs to be completed.

As applications are received, begin the interview process noting that **BEFORE** applicants are invited to a 2nd round of interviews, the Transition Officer **AND** the Bishop should be contacted to conduct Red Flag Checks. The Diocesan Director of Human Resources should also be contacted to conduct a Background Check.

Upon identifying the priest to be called, contact the Transition Officer and the Bishop. Ensure that both congregations are informed of the call **SIMULTANEOUSLY**.

Once the call has been established, connect the Wardens with the Diocesan Director of Human Resources, Kathleen Hall, (khall@edow.org) to develop the draft Letter of Agreement (LOA).

Monitor the revision of the Letter of Agreement until all are in agreement.

Gather all appropriate signatures (i.e. Wardens, Rector-elect, Bishop) and file appropriately.

*****Note** – This Transition Model reflects a timespan of 3-6 months from the inception of the Financial Review through the uploading of the Parish Profile to the OTM database, a timespan significantly shorter than historical search process timespans.

APPENDIX A

Financial Review for Parishes in Transition

In addition to providing Canon Andrew Walter with recent financial statements, we ask that you respond to the following questions:

What percentage of operating income comes from plate and pledges?

How many pledge units does that parish have for the current year?

What percentage of pledge income comes from the top 10% of pledge units?

Does the parish receive any building rental income?

If so, are these short-term rentals (i.e. one-time or month-by-month) longer-term rentals (i.e. year-by-year)? Do you have rental agreements in place?

What percentage of operating income comes from building rentals?

What percentage of operating income comes from endowments or other invested funds?

What is the Vestry policy for drawing on endowments or invest funds each year?

Has the parish drawn more than 5% from its endowment or invested funds in any one year during the last five years?

What percentage of operating income is dedicated to clergy compensation, including all benefits?

What percentage of operating income is dedicated to other staff compensation, including benefits?

Please provide the following information on the compensation for the Rector, Priest-in-Charge, Interim Rector or senior clergy:

Cash Stipend: \$

Housing Provided or Housing Allowance?

If, Housing Allowance: \$

SECA Reimbursement \$

Healthcare: Full family ____ Clergy +1 ____ Clergy Only ____

How much operating cash is on hand, as a multiple of monthly operating expenses?

When was the last time the parish finances were audited by an outside, independent public accountant.

APPENDIX B

Name of Parish Job Description

Job Title	
Reports to	
Directly Supervises	
Classification FLSA	Exempt or Non-exempt
Schedule	Full-time Part-time (hrs/wk): Temporary
Effective Date	

Job Summary

Provide a brief description of the purpose of the position. This statement is usually 2 – 3 sentences.

Essential Functions

List core job duties and responsibilities in order of importance. These are stated broadly and typically are limited to 5-6 functions. *Examples: Maintains office supply inventory within budget. Prepares age-appropriate curriculum for volunteer Sunday School teachers.*

Other Responsibilities

These do not define the job but are part of the responsibilities. *Example: Attend weekly staff meeting and semi-annual retreats.*

Qualifications and Requirements

Education and/or experience: Include knowledge, experience, skills, aptitudes, special training, licenses or certifications, or education required to perform the job competently. *Examples: Ability to read and interpret instructions for cleaning equipment and supplies. Completion of Bachelor of Arts in Music degree program (or equivalent).*

Physical Demands: *Specify requirements such as lifting, moving heavy items, using tools or equipment and other physical operations. Example: Ability sit for extended periods of time. Ability to speak in a public forum.*

Work Environment: *Briefly state where work is performed, travel requirements, exposure to noise, temperature variations, exposure to fumes, etc. Example: Occasionally exposure to lawn equipment noise. Occasional participation in outdoor programs during summer and winter months.*

Core Competencies

Acknowledgement

Employee signature:

Date:

Supervisor signature:

Date:

APPENDIX C

PARISH VITALITY ASSESSMENT - SUMMARY PAGE



The Parish Vitality assessment is a tool that is part of the clergy search process to take a close look at the ministries of the parish and identify places of strength and opportunities for growth. In the assessment, you evaluate your congregation through the lens of the seven Vital Signs of Parish Health that have been prayerfully identified in gatherings of lay and ordained leaders from across the Episcopal diocese of Washington.

1. Compelling Mission & Vision. A healthy parish has a clear understanding of its mission, states the mission clearly, and creates ministries which align to that mission.

2. Clear Path of Discipleship. A healthy parish offers clear opportunities for members of all ages to take next steps of Christian practices to deepen their faith. This discipleship path is clearly articulated, has multiple on-ramps, and provides growth opportunities for all ages to engage in formation and ministries.

3. Faithful Financial Practices. A healthy parish utilizes financial best practices such as transparency, on-time reporting to the diocese, and sustainable budgeting. Finances are a faithful conversation, understood as Christian stewardship and formation.

4. Inspiring & Capable Leadership. A healthy parish nurtures, supports and appreciates its lay and ordained leaders, investing in their training and lifting up of their discipleship.

5. Welcoming & Connecting Ministries. A healthy parish is intentional and strategic about welcoming guests; it is prepared to invite and provide next step connections.

6. Uplifting & Inviting Worship. A healthy parish gathers for worship that engages people with inspirational experiences and relevant teaching; it engages and offers full participation to all. While shaped by our Episcopal ethos, worship expresses the cultural and ethnic heritage of members and the surrounding community.

7. Blessing Our Community. A healthy parish advocates for and partners with the local community and other organizations. This engagement focuses on the welfare of our neighbors and justice initiatives such as food scarcity, racial inequities, and immigration concerns. The parish is invested in the health and well-being of its local community.

The Parish Vitality Assessment - Vital Signs and their Metrics

The goal of the Parish Vitality Assessment is to create a narrative around each of the seven vital signs for one's congregation. This document can then feed into the parish profile and other search documents such as the Office for Transition Ministry Portfolio. The assessment itself will not be published, but is a support document which will be seen by the Canon for Transition. The development of the assessment is not intended and should not be a laborious, time-consuming task, but rather an intentional space for grace for the parish to clearly state the making of their true identity. (No more than one page per vital sign).

Getting started

Make sure you are clear on the meaning of each Vital Sign so you can explain them. In the creation of the Vital Signs, fifteen metrics which support the Vital Signs have been defined and may be helpful as you evaluate your congregation.

Consider how many people you will invite into this conversation about the Vital Signs. This could include other ministry leaders and the congregation. Surveys, interviews of key leaders, focus groups or town hall meetings are excellent ways of obtaining this information. Think about what will work best for your congregation.

Seven Vital Signs

1. Compelling Mission & Vision. Thriving congregations intentionally and regularly discern God's will in ways that are grounded in Scripture and engage the whole community in a spirit of celebration of God's blessings. Regular discernment provides clarity and excitement about purpose and assists in aligning their structures and ministries with their mission.

2. Clear Path of Discipleship. Thriving congregations offer clear ways for members to grow in their faith and become stronger in the Way of Jesus. We use the same practices of teaching, fellowship, shared meals, prayer and generosity characterized the early Church in ways adapted for our time. Laying out a well defined path with several entry points helps all members go deeper in their relationship with God.

Acts 2: 42 & 46 - They devoted themselves to the apostles' teaching and fellowship, to the breaking of bread and the prayers. Day by day, as they spent much time together in the temple, they broke bread at home and ate their food with glad and generous hearts.

3. Faithful Financial Practices. Thriving congregations engage realistic and transparent budgeting and maintain reporting practices that align their financial resources with the mission and vision of the congregation. The stewardship of money, time and talent are taught and discussed through the whole year.

4. Inspiring & Capable Leadership. In thriving congregations, clergy and lay leaders partner to lead ministries and are deeply committed to growing as disciples of Jesus. These leaders live by a Rule of Life with regular rhythms of worship, prayer, study, silence, and service. They are able to clearly and joyfully articulate their faith as Christians in the Episcopal tradition. Leaders are nurtured, valued and appreciated. Training is provided and supported. The leadership has a clear vision and is in alignment. A culture of mutual love and respect is encouraged along with healthy boundaries including times of sabbath.

5. Welcoming & Connecting Ministries. Like Jesus, thriving congregations have an outsider focus and are on the move, spreading the good news. They tell stories of meeting Jesus and invite friends and neighbors to celebrate God's love. They welcome newcomers and connect them to ministries with the clear next steps to deepen faith.

Jesus said to them, "Come and see." They came and saw where he was staying, and they remained with him that day. It was about four o'clock in the afternoon. John 1:39

6. Uplifting & Inviting Worship. The church is first and foremost a worshipping community. It offers rituals and rhythms that draw people into God's story and help people interpret pivotal life experiences. When we intentionally engage people in worship, they are renewed and nourished in the presence of God and one another. They - the church - are prepared to do the work of Christ in this world. This intentionality means we work to invite people into full participation and are aware of their culture and ethnic heritages.

7. Blessing Our Community. Thriving congregations champion justice and "seek the welfare in the city" in which they live. This engagement focuses on the needs of their neighbors and justice initiatives such as food scarcity, racial inequities, immigration concerns and others. The parish is invested in the health and well-being of its local community.

But seek the welfare of the city where I have sent you into exile, and pray to the Lord on its behalf, for in its welfare you will find your welfare. Jer. 29:7

15 Metrics behind the Vital Signs (associated vital signs are in brackets)

1. Average Sunday Attendance (ASA) & Increasing Worship Attendance - What are the attendance trends in raw numbers for a parish? (***Uplifting & Inviting Worship and Welcoming & Connecting Ministries***)
2. # of First-Time Guests - Statistical studies have shown that in order to support growth, a parish needs to annually welcome as many first-time guests as they have in average Sunday attendance. (***Uplifting & Inviting Worship and Welcoming & Connecting Ministries***)
3. Ave. Parish Age vs Community - This metric looks at the average age of parishioners in comparison to the local community, but also invites us to look at comparisons in other ways such as economics, cultural backgrounds, ethnicities, and more. (***Uplifting & Inviting Worship and Welcoming & Connecting Ministries***)
4. New People in Our Database - Are we making new contacts? Are we engaging guests in such a way that we retain them and see future connections with them? (***Uplifting & Inviting Worship and Welcoming & Connecting Ministries***)
5. % of Laity in Ministry/Service - Does the parish have a growing percentage of members involved in ministries serving both the parish and the community? (***Welcoming & Connecting Ministries, Clear Discipleship Path, Blessing Our Community and Faithful Financial Practices***)
6. % of the Parish in Faith Formation (***Clear Discipleship Path and Inspiring & Capable Leadership***)
7. Sacramental Commitments - Measuring our sacramental commitments like baptisms and confirmations (***Clear Discipleship Path***)
8. Increasing # of Pledge Units - Does the parish have a growing number of households pledging financial support? (***Faithful Financial Practices and Clear Discipleship Path***)
9. Community Engagement In what and how many ways is the parish involved with community partners, advocacy and justice issues? (***Blessing Our Community***)
10. Ratio of Leaders to Attendees - This metric measures the impact of lay ministry by determining the ratio of parishioners active in leading ministries against those participating. (***Inspiring & Capable Leadership***)
11. Involved in Spiritual Practices
12. Involved with Continuing Education
13. Growth in Skills and Abilities

The three metrics above all measure if leaders, lay and ordained, are engaged in sustaining spiritual practices for themselves, and if they are seeking opportunities for continuing education and improved leadership skills. (***Inspiring & Capable Leadership***)

14. Engaged with Diocesan Initiatives and Work - This metric identifies if the parish has engaged with the diocesan Strategic Plan, opportunities for strategic work with partners like The UnStuck Church Group, and is deepening its commitment to racial equity and justice work. **(Compelling Mission & Vision)**

15. Increasing Giving to Expenses - Does the parish budget reflect a sustainable amount of operating expenses being supported by plate and pledge giving? **(Faithful Financial Practices.)**

Capturing Your Reflections

On the following page is a scale for each of the Vital signs. It may be helpful for your discussion to give your parish a rating from 1 to 10 for each vital sign, considering each on the spectrum it being a growth opportunity to a strength of your parish.

Please consider your parish's current *commitment*, *effort* and *results* in your assessment. We want to recognize that these three things work together to give us a score: 1) commitment, 2) effort and 3) results. Taking all three into account means that if we are very committed to something and making a good effort, but not seeing any results, then the score for that vital sign should not be higher than 6 or 7. If all three are identifiable, then the vital sign is a 9 or 10. This is also a time for full transparency. Making your parish sound good will not truly reflect the totality of your identity which is of paramount importance to piquing the interest of possible priest candidates. So all 10's are most likely not an accurate description.

While the score is helpful, the main purpose is the discussions that are generated and the narrative which should be a summary of those conversations.

Growth Opportunity

- 1) Compelling Mission and Vision
- 2) Clear Path of Discipleship
- 3) Faithful Financial Practices
- 4) Inspiring & Capable Leadership
- 5) Welcoming & Connecting Ministries
- 6) Uplifting and Inviting Worship
- 7) Blessing Our Community.

Strength

- [1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10]
- [1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10]
- [1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10]
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- [1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10]
- [1 --- 2 --- 3 --- 4 --- 5 --- 6 --- 7 --- 8 --- 9 --- 10]

Questions to assist your reflection on the Vital Signs

1. For each of the Vital signs, what are your strengths and what are the opportunities for growth?
2. Which one (or two) of the Vital Signs rise to the top of your parish's strengths? Which one (or two) come into focus as the greatest opportunities for growth for your parish?
3. Thinking about your assessment of your parish's greatest strength and growth opportunity, how did your parish's current level of commitment, effort and results factor in your ranking of these vital signs?
4. How are your passions and gifts as a congregation aligned with the opportunities and strengths you identified?

APPENDIX D

Parish OTM - Community Portfolio Information

Church Name _____

City _____

Address _____

Phone _____

Contact Information: _Name_____

Address _____

(City, State) _____

Phone _____

Average Sunday Attendance _____

Worship Service Numbers: Weekend: _____ Weekday: _____

Others_____

CURRENT Annual Compensation (includes all the following):

Cash Stipend: \$_____ Housing Allowance:

\$_____

Utilities Included: \$_____ Utilities NOT included _____

SECA Reimbursement \$_____ This is Full ____Half____

None ____ Other (Please list amount) \$_____

Additional Compensation Note: (20 words)

Compensation available for NEW Position: \$_____ (includes
Stipend, housing, SECA)

Negotiable (yes/no) _____

Housing available for _____ persons (if Rectory provided or offered)

Pension Plan: Church Pension Fund _____ other? _____

Healthcare Options: Full family ____ Clergy +1 ____ Clergy Only ____ Other ____

Negotiable ____

Dental (yes/no) _____

Life Insurance (yes/no) _____ Life Insurance Amount \$_____

Budgeted Housing Equity Allowance (yes/no) ____ If yes, amount
\$_____

Vacation Weeks (check 1) 4 weeks ____ One Month (including 5 Sundays) ____

Other (please indicate # of weeks and days) _____

Continuing Education: Weeks _____ Funding _____

Continuing Education

Details _____

Sabbatical Provision (check one) Yes ____ No ____ Negotiable ____

Link to Diocesan Sabbatical Policy:

Auto account (Check one) Yes ____ Amount: \$_____ No ____

Other Travel (check one) Yes ____ Amount: \$_____ No ____

Professional/Business Account (please check one)

Yes ____ Amount \$_____ No ____

Comments (20 words)

Previous incumbents in this position

Name _____ **Date Begun** _____ **Date**
Ended _____

Name _____ **Date Begun** _____ **Date**
Ended _____

Name _____ **Date Begun** _____ **Date**
Ended _____

Notes (100 words)

Schools:

Church School:

Children: Students _____ **Leaders** _____

Teens/Young Adults: Students _____ **Leaders** _____

Adults: Students _____ **Leaders** _____

Day School: (check those that apply)

Pre K ____ **K** ____ **K-6** ____ **K-12** ____ **Other** _____

Student # _____ **Teacher #** _____ **Total Staff** _____

NARRATIVE QUESTIONS

In our baptism we promise to proclaim by word and example the Good News of God in Christ, seeking and serving Christ in all persons. You are invited here to reflect on your ministry by responding to the following questions (limit 1200 characters each, including punctuation and spaces). You may answer in multiple languages, if appropriate. (Attach a file with the answers to these questions)

1. **Describe a moment in your worshiping community's recent ministry which you recognize as one of success and fulfillment.**
2. **Describe your liturgical style & practice. If your community provides more than one type of worship service, please describe all.**
3. **How do you practice incorporating others in ministry?**
4. **As a worshiping community, how do you care for your spiritual, emotional and physical well-being?**
5. **Describe your worshiping community's involvement in either the wider Church or geographical community.**
6. **How do you engage in pastoral care for those beyond your worshiping community?**
7. **Tell about a ministry that your worshiping community has initiated in the past 5 years. Who can be contacted about this project?**
8. **How are you preparing yourself for the Church of the future?**
9. **What is your practice of stewardship and how does it shape the life of your worshiping community?**
10. **What is your worshiping community's experience of conflict? And how have you addressed it?**
11. **What is your experience leading/addressing change in the church? When has it gone well? When has it gone poorly? And what did you learn?**

Please provide words describing the gifts and skills essential to the future leaders of your worshiping community. Enter no more than four descriptions made up of one or two-words each. For example: administration, asset management, preaching, pastoral care.

Notes: (100 words max)

CONNECTIONS

Your worshipping community's website

You may provide the media links to your worshipping community, e.g. audio, video, YouTube, etc.

You may provide links here to other sites where you might be found, e.g. blogs, Facebook, LinkedIn, etc.

Languages significantly represented in your parish

Languages _____

Total percentage of your Average Sunday Attendance that worships in a language other than English. _____

Provide worship or classes in the following languages _____

REFERENCES

Please provide contact information for the following references:

1. Bishop: Name

Bishop Contact Information

2. Diocesan Transition Minister: Name

Diocesan Transition Minister contact information

3. Current Warden/Board Chair Name

Current Warden/Board Chair contact information

4. Previous Warden/Board Chair Name

Previous Warden/Board Chair contact information

5. Search Chair Name/Search Chair Ministry

Search Chair contact information

6. Parish/Institution Leader Name

Parish/Institution Leader Ministry

Parish/Institution Leader Contact Information

7. Local Community Leader Name

Local Community Leader Relationship to Parish/Institution

Local Community Leader Contact Information