

Incumbent Transition Process

As an Incumbency Ends...

- 1) An incumbent intending to resign or retire gives the bishop notice of at least three months. The Bishop and incumbent decide when an announcement is to be made in the parish of the incumbent's coming departure. This announcement should be made as soon as possible once a decision is made. (In case of retirement, as long as a full year is fine.) The announcement needs to offer clear, honest reasons for the incumbent's leaving.

- 2) Within two weeks of the churchwardens becoming aware of the impending vacancy, the bishop or bishop's designate meets with the churchwardens "concerning the immediate and future needs of the parish for ordained ministry." (Canon X) The designate might be an archdeacon or the diocesan ministry developer. The focus of this meeting is about eliciting from the churchwardens all the information necessary to make decisions about what the next steps will be.
 - Does the parish anticipate any changes to its model of ministry? Will it be able to support a full-time or a part-time incumbent going forward? Is it currently sharing an incumbent with another church, and will that arrangement continue? Is this parish a candidate for some version of local baptismal ministry?
 - Is the parish healthy financially? When was the building(s) last professionally inspected? The churchwardens will provide financial statements for the past three years (including the current year-to-date).
 - Is the parish otherwise healthy? Review annual reports, any congregational surveys that may have taken place.
 - If the departing incumbent is retiring or leaving full-time ministry, is that person staying in the community? How do the wardens anticipate that working out? (See the diocesan Clergy Employment Handbook.)

- 3) Using the above information, the bishop, consulting with the archdeacon, ministry developer, and any others whom the bishop wants to include, will make a decision about which of four transition procedures will be used. Note that this decision is the bishop's. The four models are:
 - *sequential appointment*; here, there is little to no time between the conclusion of one incumbency and the beginning of the next. This would be most common in a situation where an incumbent is retiring from a healthy parish and has given significant notice of their retirement date.
 - *term appointment* of a priest; here, the priest is appointed (usually part-time) to serve in a caretaking role between incumbencies for a period of six to twelve months. This would be most common in a healthy parish with lay leaders well equipped for the tasks of overseeing ongoing parish ministry.
 - *intentional interim*; here, a priest with specialized training (in interim ministry and/or conflict, trauma, systems theory and transition) is appointed for a period of two to three years. This would be most common in a parish setting where there has been conflict or

trauma that would negatively impact the integration of a new incumbent if left unresolved. An intentional interim most often works full-time.

- *optioned appointment*. Here, the bishop appoints a priest as the next incumbent for a period of two to three years.¹ The appointment is formally reviewed four months before the term is due to be complete, with the help of diocesan resources, and then may be renewed (for a further term, or indefinitely) or brought to a close. (Note that an optioned appointment may also follow either a term or intentional interim appointment.) This would be most common in parishes with limited resources (people, money, skills, or energy) to undertake a full search process.

Where a term appointment, intentional interim, or optioned appointment is desired, the bishop's office will begin the work of recruiting an appropriate candidate and clarifying their terms of work. The bishop's office may further consult the churchwardens, or may not, and will communicate all decisions to the churchwardens as they are made. The churchwardens will be responsible for informing the parish of developments, as instructed by the bishop.

- 4) The incumbent will take care that worship in the last weeks leading up to their departure will minister to the congregation's sense of uncertainty and grief. This will include petitions in the prayers of the people offering thanks for the incumbent's ministry and asking God's guidance for the congregation. It will include addressing these themes in sermons. This is not intended to be a protracted 'funeral,' but rather guiding the relationship to a healthy sense of closure.
- 5) Together, the churchwardens and incumbent will decide what pieces of ministry will consume the major part of the incumbent's energy during the time that remains. They will make plans for how to handle any decisions for future ministry that might normally have been made by the incumbent. In addition to the regular work of ministry, the incumbent will want to devote time to:
 - Saying goodbyes in person, over the phone, or writing letters
 - Saying thank-yous, in person, over the phone, or writing letters
 - Seeking to bring closure to any difficult relationships
 - Assisting lay leadership to take on leadership of ministry tasks as appropriate
 - Spending time on their spiritual health, either in a retreat or with a spiritual directorCoaching by an experienced priest will be made available to the departing incumbent to assist them in crafting their farewells.
- 6) The churchwardens, with other members of the parish, will make arrangements for a good-bye celebration for the parish to mark the incumbent's leaving. This might take place over a formal dinner or lunch, or informally after a worship service. It would ideally include an opportunity for some members of the parish (or the wardens or some other leaders on their behalf) to thank the departing incumbent for their ministry, and an opportunity for the departing incumbent to say farewell publicly to the parish. Often this event is held at a time when members

¹ In an optioned appointment, the bishop may choose to have the parish prepare a profile, as outlined in the rest of this process, and may choose to consult the churchwardens and/or transition team, and may choose to call into being the canonical committee referenced later in this document, or the bishop may simply appoint a priest who brings the needed gifts and skills for the ministry of the parish without using any of these steps. See Canon X, section 2.

of the wider diocesan community (deanery and beyond) also might be able to attend; as soon as a date is set, the churchwardens inform the Bishop's office so that if possible the Bishop may attend.

7) A letter will be sent to all members of the parish from the bishop. This letter will be sent at least three weeks prior to the incumbent's final Sunday in the parish. It will outline the next steps that will be taken to ensure the needs of the parish for ordained ministry are met, in the immediate and longer terms. It will explain that the departing incumbent will not be available for pastoral needs (including weddings and funerals, except at the invitation of the new incumbent). A separate, more detailed letter will be sent at this time to the churchwardens outlining in writing the arrangements for the next stage of ordained ministry, including stipend, hours of work, and responsibilities of the incoming priest.

8) A liturgy of farewell will take place during the incumbent's final Sunday in the parish (which may not be their final Sunday as incumbent, if they are taking vacation time). The incumbent may craft this him/herself, or may use a form available from the diocesan ministry developer.²

9) Six weeks before the incumbent's final Sunday, the District Dean will contact the churchwardens and departing incumbent to ensure this process is being followed. (Where the departing incumbent is the district dean, the territorial archdeacon will ensure this is done.)

10) The departing incumbent will contact the Bishop's office to arrange an exit interview with the Bishop for a time prior to their leaving the parish. It will include:

- a. The incumbent's sense of personal and professional growth and disappointments over the course of their appointment in this parish
- b. The incumbent's sense of this parish's growth and challenges over the course of their incumbency, and any wisdom or insights they wish to share about the parish's life going forward, ministry opportunities they see, etc.
- c. The incumbent's feedback on how the ministry of the diocese supported the ministry of incumbent and parish well over the course of their incumbency, and what would have made that support stronger.

² It is appropriate for this liturgy to incorporate a symbolic returning of the keys of the parish to the churchwardens, as in the Celebration of New Ministry when the incumbent arrived, they received these keys from the wardens.

The Interim Period...

11) The term or interim priest works with the churchwardens and vestry to ensure core ministries of the parish are being supported. Where the priest is not full-time, this will take particular care.

12) The term or interim priest consults with the churchwardens (and possibly the departing incumbent, if appropriate) to appoint a transition team. (In an intentional interim, this step would not take place until the last six to eight months of the interim period. In a sequential appointment process, the outgoing incumbent would appoint this team six to eight months prior to her/his intended departure.) The transition team's primary responsibility at this time is to develop the parish profile, although they also have the responsibility of working alongside the term or interim priest on the broader work of parish transition. The transition team should include one churchwarden and one lay member of synod, and up to four others, who are mature in their faith and in their understanding of the parish (but who may be of any age and who may be relatively new to the parish).

13) The diocese provides one or two volunteer coaches to work with the transition team through the process of creating the parish profile. This process may include congregational meeting(s), conversations with parishioners, survey instruments, demographic research in the community, etc. The transition team generally meets weekly or bi-weekly for a period of two to three months, at which time the profile is complete. The profile is reviewed by vestry for any needed revisions.

14) The profile is reviewed by the archdeacon and bishop, and further revisions may be requested.

15) The final profile, including an executive summary or synopsis, is submitted to the bishop's office. The vacancy notice (the executive summary) is posted by the bishop's office. The vacancy is usually posted for one month to six weeks. The vacancy is posted on the diocesan website, the national church's job website, and circulated to the national House of Bishops. The parish may post the synopsis and full profile on the parish website. It will also be shared with the MNO Synod of the ELCIC. While parishioners and others might share the job posting with others, including via social media, all applications and inquiries for the parish profile, including the process for making an application, must go through the bishop's office.

Appointing the next Incumbent...

16) The bishop calls into being the canonical committee, comprised of the two churchwardens and all lay delegates to synod.³ (Note that there is no provision in the canon for

³ Note Canon X, section 3: "If at the time the Bishop calls the committee into being a church warden is also a lay delegate to Synod, the vestry shall elect a lay member of vestry to serve on the committee." This will ensure that there are always at least four members of the canonical committee.

any of these individuals to be replaced by an alternate.) This body elects a chair and thoroughly familiarizes itself with the profile and with their canonical responsibilities. The canonical committee formulates interview questions. Volunteer lay coaches are available through the diocese to assist in this task (and to be sure the committee is aware of what questions they legally may not ask!).

17) Once the posting is closed, an Advisory Committee reviews all applications received and develops a short list of candidates. This list and the applications of those who have been short-listed are passed to the chair of the canonical committee. (The Advisory Committee is constituted by the bishop, and is comprised of the bishop, archdeacon, two lay members of synod from neighbouring parishes, and the churchwardens.) Confidentiality is maintained.

18) The canonical committee interviews all short-listed candidates. (If any candidates are a distance away, they may travel for the interview or be interviewed via video conference. Travel costs are borne by the parish.) The committee chooses which candidate they will ask the bishop to appoint. Assistance can be available from the diocese in the decision-making process if requested. Churchwardens check the desired candidate's references. Confidentiality is maintained.

19) The bishop contacts the successful candidate. If that person chooses to accept the appointment, the candidate engages in conversation with the bishop about stipend to be offered, moving costs, and start date. (The bishop will have consulted with the churchwardens on these questions.) Upon successful completion of these negotiations, the bishop formally makes the appointment. The date of the announcement in the parish is negotiated with the candidate, bishop and churchwardens so that the announcement is made at the same time in the candidate's current place of ministry and the parish. Confidentiality is maintained until the formal announcement is made.

From Interim to the new Incumbent...

20) As the interim period comes to an end, the transition team is responsible at this stage for a celebration of the ministry of the term or interim priest: a dinner or other celebration, and a liturgical farewell on their final Sunday.

21) The transition team is responsible for welcoming the new incumbent and helping them to settle into their new home and parish. This will include organizing a welcome celebration in the parish, working with the bishop's office on the formal Celebration of New Ministry, and less formal tasks including ensuring that the new incumbent has ways to meet parishioners, gets to know their new neighbourhood, etc.

21) Within six months of the new incumbent beginning in the parish, she/he works with the churchwardens to create a Ministry Covenant. This document serves to clarify roles and expectations of both incumbent and parish as they minister together. Assistance, including a template for a ministry covenant, is available from the diocesan ministry developer.