

Rector's Succession Planning Checklists

Rector's Succession Plan (Immediate Replacement) — *If the rector receives a call to another parish or for whatever personal or medical reasons the rector is incapacitated and needs to leave the parish with little or no notice.*

Upon notification of a call or incapacity of the rector to perform his/her duties	Responsibility	Date Completed
Rector or someone else notifies the church of the need for short term departure from the parish or temporary incapacity	Rector or someone on his behalf	
Verify the rector's call or incapacity and expected duration	Senior Warden	
Notify the rector's wife (<i>if she is not already aware</i>)	Senior Warden	
Contact the Bishop to discuss the rector's call or incapacity	Senior Warden	
Convene a Vestry meeting to discuss and begin planning process	Senior Warden	
Decide how broadly and what information will be shared	Senior Warden and Vestry	
Notify the parish intercessors of the rector's departure or incapacity	Senior Warden	
Notify other parish clergy, staff, and other leadership positions of the rector's incapacity	Rector and Senior Warden	
Prepare a statement or announcement to the parish of the rector's departure or incapacity	Rector and Senior Warden	
Review upcoming calendar and notify all appointments & review all events, plans and activities	Administrator, or Parish Secretary	
Review rector's Letter of Agreement, insurance and benefits for applicability to departure or incapacity	Senior Warden, Administrator, or Parish Secretary	
Ask the bishop if there is another clergy person available to perform the rector's duties in the short term (<i>up to 1 year</i>)	Senior Warden	
Instruct the Finance Committee to review any implications to the parish budget and prepare a plan to accommodate any financial needs.	Senior Warden and Vestry	
<i>Please refer to the Pastoral Addenda and Parish Oversight & Administration Addenda included below.</i>		

Rector Succession Plan (Short Term) — *For whatever personal or medical reasons the Rector plans to retire perhaps in about 18 months.*

Upon Notification of Short Term Replacement	Responsibility	Date Completed
Rector notifies the Vestry of a need for replacement in the short term (<i>1 year to 18 months notice</i>)	Rector	
Decide how broadly and when information will be shared with the parish	Rector and Vestry	
Notify the Bishop and Regional Dean	Rector	
Notify the parish intercessors of the rector's departure or incapacity	Rector	
Notify other leadership positions of the rector's decision	Rector	
Prepare a statement to the congregation of the rector's decision	Rector, Senior Warden & Vestry	
Name a Search Team of 5 to 8 members including at least 2 Vestry members	Rector, Senior Warden & Vestry	
Instruct the Finance Committee to review any implications to the parish budget and prepare a plan to accommodate any financial needs of the Search Team	Senior Warden & Vestry	
Search Team Convenes to:		
Receive prospective candidates names from the Office of the Bishop, congregation and others	Search Team	

Identify possible candidates from their proficiency levels relating to the core items identified in the Parish Assessment and the parish's goals	Search Team	
Assess and rank all prospective candidates for core competencies, preaching/teaching skills, and personal priorities	Search Team	
Narrow prospective candidate list to two or three names	Search Team	
Present the prospective candidate list to the Office of the Bishop for vetting	Search Team	
Visit the vetted candidates in their current parish	2 or 3 Search Team Members	
Invite the vetted candidates to visit the parish	Search Team	
Present one or two names to the Vestry for selection	Search Team	
The Vestry shall vote for one of the candidates presented or reject both names and the process is reverted to the Search Team to present two new names within ninety days.	Rector, Senior Warden & Vestry	
Plan for the celebration of ministry of the departing rector and transition of full responsibilities to the new rector.	Rector, Senior Warden & Vestry	

Rector's Succession Plan (Long Term) — *This plan calls for the biring of a new clergy staff person who will be mentored by and eventually replace the current Rector, perhaps 24 months or so.*

Upon Notification of Long Term Replacement	Responsibility	Date Completed
Rector notifies the Vestry of a need for replacement with two years notice and a desire to mentor the replacement	Rector	
Vestry receives the proposed mentored replacement plan and discusses it with the rector.	Rector, Senior Warden & Vestry	
Vestry, without the rector present, decides to either accept the proposed mentored plan, amend it, or reject it entirely. If rejected, revert to the Short Term Replacement protocol.	Senior Warden & Vestry	
Notify the Bishop and Regional Dean and request their input	Rector, Senior Warden & Vestry	
Once a decision is made, decide how broadly and when the plan will be shared with the parish	Rector, Senior Warden & Vestry	
Notify the parish intercessors of the plan	Rector	
Notify staff other leadership positions of the plan	Rector	
Prepare a statement to the congregation of the plan	Rector, Senior Warden & Vestry	
Name a Search Team of 5 to 8 members including at least 2 Vestry members	Rector, Senior Warden & Vestry	
Instruct the Finance Committee to review the plan for any implications to the parish budget for a new clergy staff position and prepare a plan to accommodate any financial needs of the Search Team	Senior Warden & Vestry	
Search Team Convenes to:		
Receive prospective candidates names from the Rector, Office of the Bishop, congregation and others	Search Team	
Identify possible candidates from their proficiency levels relating to the core items identified in the Parish Assessment and the parish's goals	Search Team	
Assess and rank all prospective candidates for core competencies, preaching/teaching skills, and personal priorities	Search Team	
Narrow prospective candidate list to two or three names	Search Team	

Present the prospective candidate list to the Office of the Bishop for vetting	Search Team	
Visit the vetted candidates in their current parish	2 or 3 Search Team Members	
Invite the vetted candidates to visit the parish	Search Team	
Present one or two names to the Rector and vestry for selection	Search Team	
The Rector and Vestry shall vote for one of the candidates presented or reject both names and the process is reverted to the Search Team to present two new names within ninety days.	Rector, Senior Warden & Vestry	
Plan for the welcome, mentorship and transfer of institutional knowledge to the new rector over the remaining term of the departing rector	Rector, Senior Warden & Vestry	
Plan for the celebration of ministry of the departing rector and transition of full responsibilities to the new rector.	Rector, Senior Warden & Vestry	

Pastoral Addendum	
Rector's Responsibility	Substitute Responsibility
Chief Pastor for the parish	Priest-In-Charge or Interim
Plan and coordinate all aspects of the regular liturgical preparations and worship services	Priest-In-Charge or Interim Rector
Baptism and Confirmation Preparation	Priest-In-Charge or Interim
Hospital and Shut-in Visitations	Priest-In-Charge or Interim and lay pastoral leadership
Resolve conflicts with parishioners	Priest-In-Charge or Interim

Parish Oversight and Administrative Addendum	
Rector's Responsibility	Substitute Responsibility
Preside at Vestry Meetings	Senior Warden
Work with Vestry, staff and committee leadership to implement existing plans and policies of the congregation	Senior Warden, Priest-In-Charge or Interim Rector
Organize and oversee search committee and search process with guidance and assistance from the Office of the Bishop	Senior Warden & Vestry