

# Rector's Succession Planning Checklists

It is important that each congregation in the Gulf Atlantic Diocese plan ahead for a variety of scenarios leading to discerning and choosing a new Rector to serve the mission and ministry of the Parish/congregation. While each parish may have variations for the succession process, there is a general path in each case of normative succession that is applicable in most GAD congregations.

The following templates are offered as a resource and guide for the development of your specific succession plans. We encourage each congregation to think carefully through these templates and create your specific succession plan, including step-by-step processes and timelines, appropriate to your own by-laws.

In general, three different scenarios call for a normative succession plan:

1. The case of the Rector's call to another parish or incapacity of the current Rector.
2. The case of a short-term notification of the need for a new Rector.
3. The case of a long-term succession of the current Rector, normally through retirement.

Each congregation should have a plan for clergy services in case of an unexpected absence of the Rector, however even for those churches that have assisting clergy on staff, it is still important in the short-term planning to include permanent succession.

**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**

1. If the Rector notifies the church of the need for his/her short-term departure from the parish due to a call to another parish, the Senior Warden should immediately discuss with the Rector the call to gather as much information as possible about the timing and other important factors about his/her departure.
2. In the case of an incapacity or family related issue, if the Rector is not able to talk directly to the Senior Warden, his/her spouse should be contacted to verify the circumstances and confirm the need for replacement. If the Rector's spouse is not already aware of the circumstance, he/she should be notified with as much information that is available at that time.
3. In the case of a call to another congregation or parish, the Rector should have already been in conversation with the Bishop, but in the case of incapacity, the Senior Warden should immediately call the Bishop with as much information that is available.
4. Once the circumstances are confirmed, the Senior Warden should notify the Vestry and call for a meeting as soon as possible to discuss and begin to implement the succession plan process.
5. The Vestry will decide how broadly the information will be shared, when, and with whom.
  - a. Notify the parish intercessors.
  - b. Notify other clergy, staff, and other Parish leadership.
  - c. Prepare a statement or announcement to the Parish of the Rector's departure or incapacity.

6. The Parish Administrator or secretary will review the upcoming calendar and notify all appointments and review all events, plans and activities for any changes required
7. The Senior Warden, Parish Administrator, or Parish Secretary should review the Rector's Letter of Agreement, insurance, and benefits for applicability to the departure or the incapacity
8. The Senior Warden should contact the Bishop again with any updated information and if needed, ask for the names and contact information of other clergy that would be available to perform the rector's duties in the short term, up to one year.
9. The Senior Warden will instruct the Finance Committee to review any implications to the Parish budget and prepare a plan to accommodate any financial needs of the Rector and transition process. Don't forget to include moving expenses for the new Rector. That plan will then be presented to the Vestry for review, amendment if needed and approval.
10. The Senior Warden and Vestry will name a Search Team of 5 to 8 members including at least 2 Vestry members.
11. The Search Team convenes to:
  - a. Receive prospective candidate names and information from the Office of the Bishop
  - b. Identify possible candidates based on their proficiency levels relating to the core items identified in the Parish Assessment and the Parish Goals.
  - c. Assess and rank all prospective candidates for core competencies, preaching and teaching skills, and personal priorities
  - d. Two or three team members will anonymously visit the candidates in their current parish or congregation and report back to the full team.
  - e. The Search Team will invite selected candidates to anonymously visit the parish and meet the Vestry members
  - f. The Search Team will then present one or two names to the Vestry for selection.
12. The Vestry will vote to accept one of the candidates presented or reject one or both of the names presented in which case the process is reverted to the Search Team to present one or two new names within 90 days.
13. The Vestry, staff and other church leadership will plan for the celebration of the ministry of the departing Rector.
14. The Vestry, staff and other church leadership will also plan for the transition of full responsibilities to the new Rector, to include preparing a Letter of Agreement (LOA) to be negotiated with the incoming Rector and approved by the Bishop.
15. The new Rector will contact the Office of the Bishop to schedule a date for the Bishop to install him/her in a service at the Parish.

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

### **Upon Notification of Short Term Replacement**

1. After previously notifying the Bishop and the Regional Dean, the Rector notifies the Vestry of a need for his/her replacement in the short term, between twelve to eighteen months,
2. The Rector and Vestry will decide how broadly the information will be shared, when, and with whom:
  - a. Notify the parish intercessors
  - b. Notify other clergy, staff, and other Parish leadership
  - c. Prepare a statement or announcement to the Parish of the Rector's departure
3. The Senior Warden will instruct the Finance Committee to review any implications to the Parish budget and prepare a plan to accommodate any financial needs of the Rector and the transition process. Don't forget to include moving expenses for the new Rector. That plan will then be presented to the Vestry for review, amendment if needed and approval.
4. The Senior Warden and Vestry will name a Search Team of 5 to 8 members including at least 2 Vestry members.
5. The Search Team convenes to:
  - a. Receive prospective candidate names and information from the Office of the Bishop
  - b. Identify possible candidates based on their proficiency levels relating to the core items identified in the Parish Assessment and the Parish Goals.
  - c. Assess and rank all prospective candidates for core competencies, preaching and teaching skills, and personal priorities
  - d. Two or three team members will anonymously visit the candidates in their current parish or congregation and report back to the full team.
  - e. The Search Team will invite selected candidates to anonymously visit the parish and meet the Vestry members
  - f. The Search Team will then present one or two names to the Vestry for selection.
6. The Vestry will vote to accept one of the candidates presented or reject one or both of the names presented in which case the process is reverted to the Search Team to present one or two new names within 90 days.
7. The Vestry, staff and other church leadership will plan for the celebration of the ministry of the departing Rector.
8. The Vestry, staff and other church leadership will also plan for the transition of full responsibilities to the new Rector, to include preparing a Letter of Agreement (LOA) to be negotiated with the incoming Rector and approved by the Bishop.
9. The new Rector will contact the Office of the Bishop to schedule a date for the Bishop to install him/her in a service at the Parish.

**Rector's Succession Plan (Long Term)** — *This plan calls for the hiring 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**

1. After previously notifying the Bishop and the Regional Dean, the Rector notifies the Vestry of a need for his/her replacement in the long term with eighteen months to two years notice and a desire to mentor the replacement
2. The Vestry receives the proposed mentored replacement plan from the Rector and discusses it with the Rector.
3. The Vestry, without the Rector present, decides to either accept the proposed mentored plan, amend it, or to reject it entirely.
4. The Senior Warden will notify the Bishop and Regional Dean of their decision and request their input.
5. With the Bishop's and Dean's input received, the Rector and Vestry will decide how broadly the information will be shared, when, and with whom:
  - a. Notify the parish intercessors
  - b. Notify other clergy, staff, and other Parish leadership
  - c. Prepare a statement or announcement to the Parish of the Rector's departure
6. The Senior Warden will instruct the Finance Committee to review any implications to the Parish budget and prepare a plan to accommodate any financial needs of the Rector and the new replacement for the transition process. Don't forget to include moving expenses for the new Rector. That plan will then be presented to the Vestry for review, amendment if needed and approval.
7. The Senior Warden and Vestry will name a Search Team of 5 to 8 members including at least 2 Vestry members.
8. The Search Team convenes to:
  - g. Receive prospective candidate names and information from the Office of the Bishop
  - h. Identify possible candidates based on their proficiency levels relating to the core items identified in the Parish Assessment and the Parish Goals.
  - i. Assess and rank all prospective candidates for core competencies, preaching and teaching skills, and personal priorities
  - j. Two or three team members will anonymously visit the candidates in their current parish or congregation and report back to the full team.
  - k. The Search Team will invite selected candidates to anonymously visit the parish and meet the Vestry members
  - l. The Search Team will then present one or two names to the Vestry for selection.
9. The Vestry will vote to accept one of the candidates presented or reject one or both of the names presented in which case the process is reverted to the Search Team to present one or two new names within 90 days.
10. The Vestry, staff and other church leadership will plan for the celebration of the ministry of the departing Rector.
11. The Vestry, staff and other church leadership will also plan for the transition of full responsibilities to the new Rector, to include preparing a Letter of Agreement (LOA) to be negotiated with the incoming Rector and approved by the Bishop.
12. The new Rector will contact the Office of the Bishop to schedule a date for the Bishop to install him/her in a service at the Parish.