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**ADGL Rector's Succession Planning Checklist**

It is important that each congregation in the Anglican Diocese of the Great Lakes (ADGL) plan for a variety of scenarios leading to discerning and choosing of a new Rector/Vicar to serve the Mission and Ministry of the Congregation. While each congregation may have variations for the succession process, there is a general path in each case of normative succession that is applicable in most ADGL 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. (See ADGL Guidelines for the Vestry and Search Committee)

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

1.The case of the Rector’s/Vicar’s call to another congregation or incapacity of the current Rector/Vicar.

2.The case of a short-term notification of the need for a new Rector/Vicar.

3.The case of a long-term succession of the current Rector/Vicar, normally through retirement.

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

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

**Upon notification of a call or incapacity of the Rector/Vicar to perform their duties**

1. If the Rector/Vicar notifies the congregation of the need for their short-term departure from the parish due to a call to another congregation, the Senior Warden should immediately discuss with the Rector/Vicar the call to gather as much information as possible about the timing and other important factors concerning their departure.
2. In the case of an incapacity or family related issue, if the Rector/Vicar 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/Vicar’s spouse is not already aware of the circumstance, he/she should be notified with as much information as is available at that time.
3. In the case of a call to another congregation, the Rector/Vicar should have already been in conversation with their Diocesan Bishop, but in the case of incapacity, the Senior Warden should immediately contact the Bishop with as much information as is available to them at that time.
4. Once the circumstances are confirmed, the Senior Warden should notify the Vestry and call for a special 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.
   1. Notify the congregation and the Vestry intercessors.
   2. Notify other clergy, staff, and other leadership in the congregation.
   3. Prepare a statement or announcement to the congregation of the Rector’s/Vicar’s departure or incapacity.
6. The Parish Administrator or the secretary of the congregation will review the upcoming calendar and notify all appointments and review all events, plans and activities for any changes that may be required due to the circumstances.
7. The Senior Warden, Church Administrator, or Church Secretary should review the Rector’s/Vicar’s Letter of Agreement, insurance, and benefits for applicability to the departure or their 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/Vicar’s duties in the short term, (up to one year).
9. The Senior Warden will instruct the Finance Committee (If none the treasure) to review any implications to the Congregation’s budget and prepare a plan to accommodate any financial needs of the Rector/Vicar and transition process. Remember to include moving expenses for the new Rector/Vicar (See ADGL Clergy Compensation Guide) That plan will then be presented to the Vestry for review, amendment if needed and approval by the Vestry.
10. The Senior Warden and Vestry will name a Search Committee of 5 to 8 members normally including 2 Vestry members.
11. The Search Team convenes to:
    1. Receive prospective candidate names and information from the Office of the Bishop.
    2. Identify possible candidates based on their proficiency levels relating to the core proficiencies identified in the Congregational Assessment.
    3. Prepare an Application that includes but not limited to: (1) Full Legal Name (2) Addresses over the past ten years (3) Phone number (preferably cell) and email address (4) Three References with Name, Relationship, and contact information, (5) Educational Background (6) Present Employer with contact Information, (7) Date and Place of Ordination(s) (8) Have they completed an Oxford Background Check with Date (9) All Bishops they have served under with current phone numbers. *Reminder all candidates must be approved by the Bishop prior to being called. In addition, the candidates “Psych Evaluation” when they were first ordained (If not available a new evaluation will be done by the Diocese) must be forwarded and reviewed by the Diocese before you can call the Candidate. Important a copy of the application should be immediately sent to the Assistant to the Bishop.*
    4. Assess and rank all prospective candidates for core competencies, preaching and teaching skills, and personal priorities. Before moving to the next step contact the Bishop or your assigned Diocesan contact for approval to move forward with each candidate.
    5. Two or three team members may anonymously visit the candidates in their current congregation and report back to the Search Committee.
    6. The Search Committee may invite selected candidates to anonymously visit the congregation.
    7. The Search Committee 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 names presented in which case the process is reverted to the Search Committee to present one or two new names within a specified time frame usually 90 to 120 days.
13. The Vestry, staff and other congregation leadership will plan for the celebration of the ministry of the departing Rector/Vicar.
14. The Vestry, staff and other congregation leadership will also plan for the transition of full responsibilities to the new Rector/Vicar, to include preparing a Letter of Agreement (LOA) to be negotiated with the incoming Rector/Vicar and approved by the Bishop.
15. The new Rector/Vicar will contact the Office of the Bishop to schedule a date for the Bishop to install him/her in a service at the Congregation.

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

**Upon Notification of Short-Term Replacement:**

1. After previously notifying the Bishop, the Rector/Vicar notifies the Vestry of a need for his/her replacement in the short term, between twelve to eighteen months,
2. The Rector/Vicar and Vestry will decide how broadly the information will be shared, when, and with whom:
   1. Notify the congregation’s intercessors.
   2. Notify other clergy, staff, and other leadership in the Congregation.
   3. Prepare a statement or announcement to the Congregation of the Rector’s/Vicar’s departure.
3. The Senior Warden will instruct the Finance Committee (If none the treasurer) to review any implications to the budget and prepare a plan to accommodate any financial needs of the Rector/Vicar and the transition process. Remember to include moving expenses for the new Rector/Vicar. (See ADGL Clergy Compensation Guide). That plan will then be presented to the Vestry for review, amendment, and final approval.
4. The Senior Warden and Vestry will name a Search Committee of 5 to 8 members normally including 2 Vestry members.
5. The Search Committee convenes to:
   1. Receive prospective candidate names and information from the Office of the Bishop.
   2. Identify possible candidates based on their proficiency levels relating to the core proficiencies identified in the Congregational Assessment.
   3. Prepare an Application that includes but not limited to: (1) Full Legal Name (2) Addresses over the past ten years (3) Phone number (preferably cell) and email address (4) Three References with Name, Relationship, and contact information, (5) Educational Background (6) Present Employer with contact Information, (7) Date and Place of Ordination(s) (8) Have they completed an Oxford Background Check with Date (9) All Bishops they have served under with current phone numbers. *Reminder all candidates must be approved by the Bishop prior to being called. In addition, the candidates “Psych Evaluation” when they were first ordained (If not available a new evaluation will be done by the Diocese) must be forwarded and reviewed by the Diocese before you can call the Candidate.*  *Important a copy of the application should be immediately sent to the Assistant to the Bishop.*
   4. Assess and rank all prospective candidates for core competencies, preaching and teaching skills, and personal priorities. Before moving to the next step contact the Bishop or your assigned Diocesan contact for approval to move forward with each candidate.
   5. Two or three team members may anonymously visit the candidates in their current congregation and report back to the Search Committee.
   6. The Search Committee may invite selected candidates to anonymously visit the congregation and meet the Vestry members.
   7. The Search Committee 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 names presented in which case the process is reverted to the Search Committee to present one or two new names within a specified time frame usually 90 to 120 days.
7. The Vestry, staff and other congregation leadership will plan for the celebration of the ministry of the departing Rector/Vicar.
8. The Vestry, staff and other congregation leadership will also plan for the transition of full responsibilities to the new Rector/Vicar, to include preparing a Letter of Agreement (LOA) to be negotiated with the incoming Rector/Vicar and approved by the Bishop.
9. The new Rector/Vicar will contact the Office of the Bishop to schedule a date for the Bishop to install him/her in a service at the Congregation.

Rector's/Vicar’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/Vicar, perhaps 18 to 24 months.*

**Upon Notification of Long-Term Replacement**

1. After previously notifying the Bishop, the Rector/Vicar 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/Vicar and discusses it with them.
3. The Vestry, without the Rector/Vicar present, decides to either accept the proposed mentored plan, amend it, or to reject it entirely.
4. The Senior Warden will notify the Bishop of their decision and request their input.
5. With the Bishop’s input received, the Rector/Vicar and Vestry will decide how broadly the information will be shared, when, and with whom:
   1. Notify the congregation’s intercessors.
   2. Notify other clergy, staff, and other leadership in the congregation.
   3. Prepare a statement or announcement to the Congregation of the Rector’s/Vicar’s departure.
6. The Senior Warden will instruct the Finance Committee (If none the treasurer) to review any implications to the budget and prepare a plan to accommodate any financial needs of the Rector/Vicar and the transition process. Remember to include moving expenses for the new Rector/Vicar. (See ADGL Clergy Compensation Guide). That plan will then be presented to the Vestry for review, amendment, and final approval.
7. The Senior Warden and Vestry will name a Search Committee of 5 to 8 members normally including 2 Vestry members.
8. The Search Committee convenes to:
   1. Receive prospective candidate names and information from the Office of the Bishop.
   2. Identify possible candidates based on their proficiency levels relating to the core proficiencies identified in the Congregational Assessment.
   3. Prepare an Application that includes but not limited to: (1) Full Legal Name (2) Addresses over the past ten years (3) Phone number (preferably cell) and email address (4) Three References with Name, Relationship, and contact information, (5) Educational Background (6) Present Employer with contact Information, (7) Date and Place of Ordination(s) (8) Have they completed an Oxford Background Check with Date (9) All Bishops they have served under with current phone numbers. *Reminder all candidates must be approved by the Bishop prior to being called. In addition, the candidates “Psych Evaluation” when they were first ordained (If not available a new evaluation will be done by the Diocese) must be forwarded and reviewed by the Diocese before you can call the Candidate. Important a copy of the application should be immediately sent to the Assistant to the Bishop.*
   4. Assess and rank all prospective candidates for core competencies, preaching and teaching skills, and personal priorities. Before moving to the next step contact the Bishop or your assigned Diocesan contact for approval to move forward with each candidate.
   5. Two or three team members may anonymously visit the candidates in their current congregation and report back to the Search Committee.
   6. The Search Committee may invite selected candidates to anonymously visit the congregation and meet the Vestry members.
   7. The Search Committee 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 names presented in which case the process is reverted to the Search Committee to present one or two new names within a specified time frame usually 90 to 120 days.
10. The Vestry, staff and other congregation leadership will plan for the celebration of the ministry of the departing Rector/Vicar.
11. The Vestry, staff and other congregation leadership will also plan for the transition of full responsibilities to the new Rector/Vicar, to include preparing a Letter of Agreement (LOA) to be negotiated with the incoming Rector/Vicar and approved by the Bishop.
12. The new Rector/Vicar will contact the Office of the Bishop to schedule a date for the Bishop to install him/her in a service at the Congregation.