

# **CALLED TO WORK TOGETHER**

A Handbook on  
Letters of Agreement  
for  
Clergy and Congregations

by  
Richard L. Ullman

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Published by  
Office for Ministry Development  
Episcopal Church Center  
815 Second Avenue  
New York, New York 10017-4594  
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First Edition: 1983  
Revised: 1988, 1990, 1993

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## ACKNOWLEDGEMENTS

This handbook has grown out of the experiences of many people. The Model Letter of Agreement is built on a similar one that appeared in an Alban Institute publication, *Do You Know the Way to San Jose?*, by A. Richard Bullock (1975). That early model was modified by the experience of clergy and congregations who adapted it to their situations in the Miami Valley Region of the Diocese of Southern Ohio. This was followed by discussions among deployment officers in the Mid-West. Next came extensive commentary on successive drafts of the project, which I developed while a Fellow at the College of Preachers, Washington, D.C.

During that six-week fellowship, I had many helpers: the staff of the College of Preachers, and many persons attending conferences while I was in residence; the Rev. Loren B. Mead, President of The Alban Institute; diocesan officials and parish leaders in the Dioceses of Maryland, Pennsylvania, Virginia, and Washington. I am grateful for every comment and criticism offered to the work in progress; I believe each one improved the quality of the project. I feel very much a steward of the gifts and experiences all those comments and criticisms represent; I believe they have made it possible for me to present the Church with a consensus on letters of agreement.

None of this would have been possible without the sabbatical leave provided by the Miami Valley Episcopal Council, the Fellowship from the College of Preachers, and a continuing education grant from the Diocese of Southern Ohio. My special thanks to all the people in all those places who supported me in this project.

—Richard L. Ullman  
*Feast of Leo the Great*  
*November 1983*

### **Preface to 1988 Edition**

In the five years since it was written, about three thousand copies of this handbook have been distributed. Several diocese now use it at the end of each calling process to help clergy and congregations clarify their terms of call.

I am grateful that it has been proving useful. I am still more grateful for suggestions for improvements that add clarity, flexibility or fairness. It has been a pleasure to incorporate these suggestions in this edition.

—Richard L. Ullman  
*Saint Mark's Day*  
*April 1988*

## FOREWORD

"Whaddayamean, *contract!*" the priest said, belligerently. "Mine is a vocation, a calling from God -- not a job!"

The problem is, he told the truth. He had a right to be offended. Being rector of a parish is not just a job. I don't know many people who would take it for the pay and prestige alone. Although the work has hard, slogging, tough, complex things to be done, all those things exist within a framework of meaning that comes from a sense of commitment, of response to the purposes of God for one's life. That priest spoke from that truth, a truth most priests feel in one way or another.

One thing that sometimes gets *missed*, or undervalued in that passion is the fact that God calls us to see all "jobs" as "vocations". Some priests let their sense of high calling interfere with perceiving the depth of meaning in the hundreds of jobs that Christians live in, suffer in, contribute through in the non-Church world, in many cases living out a sense of vocation quite as fully as do most priests.

Within the secular realm, many things have been learned about jobs and vocations. Some of those things have application to how clergy do their work in their very special institutional setting -- the life of the Church-as-institution. The concept of "contract" is one of those things. It is clear in what we have learned about work and how men and women relate to their work, that increased clarity about expectations can be very helpful in building accountability between those who work together or for one another. Some of the unhappiest working situations are those in which one or more people in the work setting are continually being surprised by the others. They do not do what others thought they were going to do; they do not do it in the time frame that others needed them to have it done in; or they do it in quite different ways than others expected.

Because of that, it becomes important in any situation in which people work together for there to be some process of talking about what each will be doing, making agreements. In some business relationships, those agreements are called contracts. In some religious organizations I know, the biblical word for agreement is used -- covenant. The best contracts in businesses I know feel like covenants. Some of the covenants I know in religious organizations feel as bad as some of the worst contracts I've seen in business.

In this brief, but most helpful handbook, Dick Ullman, who has assisted as mid-wife in dozens of discussions between vestries and clergy as they developed their own form of agreement about the way the vocation of the ordained person will relate to the many vocations of the lay people, tells us what he has learned.

The handbook is a guide, a set of suggestions and reminders, not a rigid blueprint. Dick has found many points that need to be taken into account, and at each one of them he tells you what he knows -- things to look for, things to be sure you talk about, options that others have considered, and he often gives additional resources you might want to explore more deeply.

You will find that he doesn't cover everything you may want to cover in your situation. It is in the spirit of the handbook that you explore new territory yourselves. It is also in the spirit of the handbook, indeed it is specifically stated, that all agreements must be subject to revision -- after living in one set of agreements for a while you always discover that new things have occurred leading to a need for new agreements.

One final point. There was a day in which vestries acted primarily to call a rector. *They* selected the person they thought would rule with equity, and they turned the show over to the elected rector. That rector then ran the show and called all the shots. That *was* the contract, although nobody talked about it as such. Today, in most parishes, there is a desire for a different kind of collaborative leadership, not denying the special character of the rector's leadership. Where collaboration is desired, some work on how that collaboration is to work is essential.

Dick is not interested in helping you simply lock up every jot and tittle in a legalistic straitjacket. He is interested in helping clergy and laity shape a mutually beneficial working relationship. I believe this modest set of suggestions can make a contribution to you, whether you use it completely or not. Whether you like the idea of contracts, covenants, and agreement or not! I am grateful to Dick for bringing this knowledge together and making it available to us.

—The Rev. Loren B. Mead  
President, The Alban Institute  
*January 24, 1984*

# INTRODUCTION

Two of them had asked for places of authority. Their leader explained how they were to exercise authority, not as rulers of the heathen who have power, but as servants one of another (*Mark 10:35-45*). Jesus demonstrated that kind of servanthood on the night he was betrayed when, over the protests of his friends, he washed their feet (*John 13.1-16*).

Neither James and John who had asked for the special places, nor Peter who objected to the foot-washing, welcomed Jesus' teaching about mutuality in service. A few years later Paul, a newcomer to their community, reported to churches in Galatia how he had to struggle with some of the same persons over the same issue (*Galatians 2:1-9*).

Paul tirelessly repeated the lesson Jesus lived. To the Galatians, he insisted on their unity in Christ. He gave the church at Corinth the image of a body, each organ of which contributes its gift to the health of the whole. He introduced himself to the church at Rome using the same rich image of a variety of gifts in one body.

This mutuality in ministry is reaffirmed again when the Church ordains a person to priesthood. The Bishop asks the candidate to labor together with "all whom you are called to serve...and with your fellow ministers to build up the family of God" (*Book of Common Prayer*, page 532). That call is reinforced when a priest is instituted as Rector of a parish and the community presents symbols of leadership that have full meaning only in community: Bible, water, bread and wine, keys, Constitution and Canons of the Church (*Book of Common Prayer*, pages 561-562).

The pastoral relationship is deeply rooted in a vibrant history that includes all this: Peter, James and John learning servanthood with Jesus; Paul growing with that gifted community of servanthood in Galatia, Corinth and Rome; Bishops ordaining priests called out to lead the gifted community, and instituting Rectors into specific parts of the community.

From one generation to another in the church, expectations and conditions surrounding pastoral leadership change. During any one pastorate, the elements of the relationship between clergy and congregation alter.

Under the pressure of such changes, a new practice has been emerging in recent years. Clergy and congregations, eager to reinforce each other's gifts and to strengthen their mutual service, have begun writing out key dimensions of the pastoral relationship in the form of a "Letter of Agreement".

This handbook presents a model letter of agreement, with commentary to explain the significance of its clauses. It should be used as a basis of discussion, a checklist of points to be covered.

Although a Rector and Vestry might decide at any point in their relationship to enter into a letter of agreement, a usual time to begin to use one is just after a call has been extended. The letter of agreement becomes the means to articulate the details of extending and accepting that call.

A letter of agreement is a tool for mutual ministry. Two other tools are position description, and periodic mutual ministry review. When all three are used -- letter of agreement, position description, and periodic mutual ministry review -- pastor and congregation can choose better directions for their mutual ministries, and so support one another in common discipleship.

Although the body of this handbook is about the first of these three, an Appendix is devoted to each of the other two. Each tool reinforces the other. Clergy and congregations who secure the help of a qualified outside consultant will find their use of these tools significantly enhanced.

The handbook is one form of consultation, but it lacks flexibility and cannot take account of unusual circumstances. We therefore recommend that, in addition to this book, a Rector and Vestry secure the help of another person when they develop their own letter of agreement, the position description and a process for periodic mutual ministry review.

Since this was written from within the Episcopal Church, it uses the terms of Rector, Vestry, Diocese, etc. A modest effort of translation (e.g., Pastor, Annual Conference, Presbytery, etc.) should make the present work useful in other denominations.

**A MODEL LETTER OF AGREEMENT**

between

The Wardens and Vestry of

\_\_\_\_\_ Church,

and

The Reverend \_\_\_\_\_

who has been elected Rector with the understanding that this tenure is to continue until dissolved by mutual consent or by arbitration and decision as provided by the relevant Canons of the Diocese of \_\_\_\_\_ and of the General Convention.

**COMMENTARY**

*The Model shown is a Letter of Agreement between a Rector and Vestry. It can be adapted to other positions, such as Interim Pastor, Associate Rector, Diocesan Staff Officer, or Executive of a Church Agency.*

*The Church's canons govern the relationship between clergy and congregation. A Letter of Agreement fleshes out that canonical relationship by paying attention to legal and financial dimensions.*

*The Model is a guide. It contains provisions that are common in some dioceses, unheard of in others. Some clergy and congregations may find provisions that do not apply to their situations. In other cases, clergy and congregation may need to develop their own provisions, either as additions or substitutions.*

**MODEL**

**Preamble**

The Rector shall lead \_\_\_\_\_ Church as pastor, priest and teacher, sharing in the councils of this congregation and of the whole Church, in communion with our Bishop. By word and action, informed at all times by the Holy Scriptures, the Book of Common Prayer, and the Constitution and Canons of the General Convention and our Diocese, the Rector shall proclaim the Gospel, love and serve Christ's people, nourish them, and strengthen them to glorify God in this life and in the life to come.

This ministry is further described in the Rector Position Description approved by the Rector, Wardens and Vestry on \_\_\_\_\_, which is hereby acknowledged and made part of this Letter of Agreement.

**Alternate Wording About Position Description**

This ministry will be further described in a Rector Position Description which meets the mutual approval of Rector, Wardens and Vestry, to be completed between the seventh and twelfth months of their ministry together. When the Rector Position Description has been thus completed, it shall be considered a part of this Letter of Agreement.

**End of Alternate Wording**

**COMMENTARY**

*The Preamble is based on the Letter of Institution of a Minister (Book of Common Prayer, page 557). It points to the truth that no documents, however carefully drawn, can guarantee results at the most important level of parish life: the covenantal relationship and sacramental communication through which, by God's grace, a holy people is built up, nourished and energized for mission. All other provisions are only aids to those more significant ends.*

*A Letter of Agreement deals mainly with legal and financial matters. But the first paragraph of this section acknowledges that things of the Spirit are at the heart of the pastoral relationship.*

*The Letter of Agreement should be supplemented by a Position Description, to specify professional and sociological dimensions that are beyond the scope of this Model. Appendix A describes one approach to writing a Position Description.*

*The Preamble's second paragraph applies where the Position Description has been written before the parties negotiate a Letter of Agreement.*

*The alternate wording applies when there is no pre-existing formal Position Description. It is then useful to write one after the parties have had time to experience one another's ministries.*

**MODEL**

**COMMENTARY**

**Section A. Times of Work & Leave**

- (1) The Rector's work includes not only activities directed to the parish and its well-being, but also labors on behalf of the Diocese and community. The Rector's scheduled workweek is five days, usually measured as ten to twelve units of mornings, afternoons, or evenings in various combinations reflecting the demands of this ministry. In general, no more than three evenings per week are expected. The Rector is expected to preserve at least one continuous twenty-four hour period each week solely for personal and family use.
  
- (2) The Rector will have the following periods of leave at full compensation:
  - (a) National Holidays, to be taken so as not to interfere with worship for major occasions.
  
  - (b) One month Annual Vacation, consisting of twenty-three workdays, which shall include five Sundays. No more than \_\_\_\_ days and one Sunday may be carried forward to succeeding years.
  
  - (c) Professional Development Leave, at the rate of two weeks per year.

*Priesthood is a **vocation**, the response to which is lived out twenty-four hours a day, seven days each week. A Rectorship, or any other position in the Church, is an **occupation** in which, if a person is not a careful steward of physical and spiritual energies, burnout can easily occur. Understanding this distinction between vocation and occupation — calling and job — is a good starting point to discuss times of work and leave for clergy.*

*Part of an ordained person's calling is to live out a Rectorship or any other job in such fashion as to "be a wholesome example to [the] people". A growing body of evidence indicates how unwholesome it can be when people — clergy or lay — neglect time for family, for personal growth, for recreation, and for Sabbath rest. That principle is reflected in this Model in very concrete ways:*

*—a scheduled workweek that conforms to contemporary standards for "on-duty" time.*

*—recognition that work in the Diocese and the community are part of the job, not optional extras.*

*—clarity about national holidays and vacation time.*

*Provision for professional development, or continuing education, is now standard practice in the church. The daily pressures of most clergy's work permit little time for spiritual reflection and study, for retreats, and for maintaining or improving skills and levels of knowledge. When clergy are away for such purposes, it is the congregation's responsibility to pay any substitutes.*

MODEL

COMMENTARY

**Section A. Times of Work & Leave  
(continued)**

(d) Two weeks per year of service in this parish for Sabbatical Leave, to be available after the third year, and cumulative through the sixth year.

Sabbatical arrangements shall be made in full consultation with the Vestry, to insure benefits for the parish as well as for the Rector.

(e) \_\_\_\_\_ weeks Parental Leave for the period immediately surrounding the birth of a child to the Rector/Rector's wife, beginning at a time decided by the Rector.

*Sabbatical leave is a growing practice in the church, but not yet common. The aim is "Sabbath time": an experience more reflective and regenerative than is possible during short continuing education episodes. The parallel is Biblical: the seventh year in which the land lies fallow, the seventh day on which all rest in order to refresh themselves (Exodus 23:10-12).*

*The emerging consensus is that short sabbaticals (lasting two to four months) contribute strongly to effective total ministry. Length of sabbatical is only one issue which must be discussed well in advance by Rector and Vestry. Other issues include:*

*—additional costs to parish during sabbatical for supply clergy, etc.*

*—the Rector's re-entry into the congregation at sabbatical's end.*

*—an understanding of how the proposed sabbatical will benefit not only the Rector but the whole congregation.*

*—plans for communicating the fruit of the sabbatical to the congregation.*

*Sabbatical Planning for Clergy and Congregations, available from The Alban Institute, 4125 Nebraska Avenue NW, Washington, DC 20016, shares experiences of clergy who have experienced sabbaticals. It provides checklists for planning, and describes payoffs and pitfalls for congregations.*

*Maternity leave for a Rector is a contingency new with the ordination of women to the priesthood. The corresponding concept of paternity leave has developed out of a growing understanding of the importance of the father's contribution to the process of assimilating a new child into the family.*

MODEL

COMMENTARY

**Section B. Compensation**

- (1) The Rector's annual cash salary will be \$\_\_\_\_\_, paid monthly on or before the \_\_\_\_ day of the month, to be reviewed and adjusted annually in light of changes in the \_\_\_\_\_ Consumer Price Index and the current Diocesan minimum clergy salary standard.

Upon the Rector's request, the Vestry will designate a portion of the total cash salary as "Housing Allowance" under the Federal Internal Revenue Code.

*Clergy compensation is not a simple matter. The tax laws and Church Pension Fund formulas are full of technicalities. Moreover, compensation involves subtle issues of value and worth that have sacramental, social and psychological impact. Through it all, there is the issue of the financial welfare of a priest's household. It is a sign of a healthy pastoral relationship when the Vestry discusses and makes compensation decisions openly and in the Rector's presence.*

*This Model treats first the case of clergy compensation which includes a housing allowance. Then follows alternate wording for compensation where there is church-provided housing.*

*Encouraged by federal tax incentives and the need to plan for a residence when retired, a growing number of clergy — a majority in many dioceses — no longer live in church-provided housing. The federal tax code encourages naming a large portion of a clergyperson's compensation as "Housing Allowance", according to these rules:*

*—The Vestry or other governing body must officially designate the Housing Allowance in advance of payment. That income is then sheltered from federal tax. (Some jurisdictions also extend that shelter to local taxation.)*

*—The maximum allowable Housing Allowance is the amount equal to the Fair Rental Value of the residence, fully furnished, plus actual cost of all utilities.*

*—Any portion of the Housing Allowance not spent on allowable housing expenses becomes taxable as ordinary income. The clergyperson is responsible to keep records to account for this.*

MODEL

**Section B. Compensation (continued)**

(2) The Rector shall receive SECA Reimbursement payments, quarterly before the 15th of April, June, September, and December, according to the following formula: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_.

COMMENTARY

—Allowable housing expenses include: rental or mortgage payments; tax, utility, and insurance payments; maintenance, decoration, and capital improvement costs, whether for the basic structure, for furnishings, or for grounds.

*The Housing Allowance is normally a designation of a portion of the clergyperson's total salary. It represents no additional expense to the congregation; in tax accounting terms it is a salary reduction.*

*There are frequent changes in tax rules and in the tax code itself. It is important that compensation decisions keep abreast of such changes.*

*The Self-Employment Contributions Act (SECA) places a heavy burden on clergy by taxing them for Social Security at the high rate for Self-Employed persons, while exempting congregations from the usual Employer's share of SECA payments. To remedy this inequity, it is the practice in many places to give the clergy SECA Reimbursement payments. Formulas for such payments vary. Three common ones are:*

1. *Complete reimbursement for all SECA payments made by the clergy.*
2. *Reimbursement of the amount the congregation would have to pay were it not for the special SECA treatment of clergy.*
3. *Reimbursement of the difference between SECA payments that would be made as a regular employee, and the payments actually made under the clergy's special SECA status.*

**MODEL**

**COMMENTARY**

**Section B. Compensation (continued)**

*Because clergy are fully taxed on SECA Reimbursement payments, some formulas provide additions to the base payment to cover all taxes (SECA, Federal, State and Local income) due on that base. SECA Reimbursements payments count as additional salary, often paid on a quarterly basis to coincide with the due dates of SECA tax payments.*

*Clergy are "Self-Employed" only for SECA purposes. Federal tax regulations otherwise count clergy as employees of the congregation, and require the parish to file a Federal Form W-2. Consult the Internal Revenue Service and other authorities for current advice on procedures for this and other tax matters.*

(3) The Vestry shall pay the following benefits:

(a) Church Pension Fund Assessment on the sum of the Rector's total annual cash salary (including Housing Allowance), plus the Rector's SECA Reimbursement.

*Church Pension Fund rules define the assessment base to include the total of all the payments discussed immediately above: Salary, including Housing Allowance, and SECA Reimbursement.*

**Alternate Wording for Church-Provided Housing**

**Section B. Compensation (Alternate)**

(1) The Rector's annual cash stipend will be \$\_\_\_\_\_, paid monthly on or before the \_\_\_\_ day of the month, to be reviewed and adjusted annually in light of changes in the \_\_\_\_\_ Consumer Price Index and the current Diocesan minimum clergy salary standard.

*In dioceses that specify a clergy compensation standard, church-provided housing is often assumed to be part of compensation. The cash portion of the compensation is then referred to as "cash stipend".*

MODEL

COMMENTARY

**Section B. Compensation (Alternate, continued)**

Upon the Rector's request, the Vestry will designate a portion of the annual cash stipend as "Housing Allowance" under the Federal Internal Revenue Code.

(2) The Rector shall have full use of the Rectory at \_\_\_\_\_ as personal residence. No parish activities will be planned at the Rectory without the invitation of the Rector's household. Expenses connected with the Rectory shall be handled as follows:

(a) Utilities shall be contracted for and paid directly by the Vestry.

(b) Expenses for repair, remodeling and major appliances shall be paid by the Vestry in accordance to an annual plan and budget mutually agreed to by the Rector and Vestry. Within that plan and budget, the Rector may authorize such expenditures, up to \$\_\_\_\_\_ monthly, reporting them within ten days to the Vestry.

*A portion of the cash stipend may be designated as "Housing Allowance" even when there is church-provided housing. In this case, the allowable expenses would include costs of acquiring and maintaining furnishings and appliances, and any other residence-related costs which are not paid or reimbursed by the congregation. Although the dollar amounts are substantially different, the rules governing such a Housing Allowance are the same as in the case where there is no church-provided housing (please refer to Commentary on pages 7 & 8).*

*Local customs with respect to church-provided housing vary. The Model suggests guidelines that give Rectory residents freedom and control in their living space, while protecting Vestry ownership rights and responsibilities. Two common variations on the Model's provisions are:*

*—Payment of utilities directly by the Rector, with reimbursement by the parish*

*—Rectory grounds maintenance provided as part of an overall grounds maintenance program of the parish*

*It is important to specify details in writing so that future misunderstandings may be avoided, and the privacy of Rector's residence be maintained.*

**MODEL**

**COMMENTARY**

**Section B. Compensation (Alternate, continued)**

(c) Use and maintenance of Rectory grounds are at the Rector's discretion and personal expense, with the exception of major alterations to the basic landscaping plan, and such grounds maintenance items as may be included in the annual plan and budget referred to in sub-paragraph (b) above.

- (3) The Rector shall receive SECA Reimbursement payments, quarterly before the 15th of April, June, September, and December, according to the following formula:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

- (4) The Vestry shall pay the following benefits:

(a) Church Pension Fund Assessment on the sum of: the Rector's annual cash stipend; the Rector's SECA Reimbursement; the actual cost of Rectory utilities; and the value of the use of the Rectory according to the Church Pension formula.

**End of Alternate Wording**

*Please see Commentary on pages 8 & 9 for discussion of SECA Reimbursement.*

*Church Pension Fund rules require that all compensation elements be included in the pension assessment base.*

(b) Health and Hospital Insurance (HHI), equivalent to or better than the group plan provided through the Diocese.

*Most clergy insurance benefits are governed by diocesan rules and contracts, or by state law, as in the case of workers' compensation insurance. Local requirements must therefore be thoroughly researched.*

**MODEL**

**COMMENTARY**

**Additional Wording  
for Special Cases**

If equivalent or better HHI is provided independently through the employment of the Rector's spouse, the Rector may waive participation in the Diocesan HHI plan. The Vestry will then not provide duplicate coverage but will use the amount of the Diocesan HHI premium to provide a non-income benefit of similar cost. If at any time the Rector revokes the waiver, the Vestry will provide HHI in accordance with the Diocesan plan.

**End of Alternate Wording**

*In two-career couples, the family's health insurance may already be provided through the clergy spouse's employment. It makes sense in such cases to provide a benefit of equivalent cost, such as contributions to a tax-sheltered annuity. This way the parish continues to be responsible for the full cost of the position, but does not provide an unnecessary benefit.*

(c) Group Life and Accidental Death and Dismemberment Insurance, equivalent to or better than the group plan provided through the Diocese.

(d) Workers' Compensation Insurance, as provided by State Law.

(e) Income Replacement Insurance, to enable the parish to continue clergy services in the event the Rector, through long-term illness or temporary disability, becomes unable to perform the duties of office. Insurance proceeds go directly to the Rector, whereupon salary payments are reduced in like amount. The funds thereby released shall provide supply services to meet parish priestly needs during the Rector's disability. In this event, Pension Fund and SECA Reimbursement payments shall be maintained as if the Income Replacement Insurance were not in effect.

*Income Replacement Insurance protects the parish as much or more than it protects the clergyperson. Should benefits come due under such a policy, the parish would be free to reduce the Rector's salary or stipend by the amount of the benefits, and redirect those funds to pay for temporary clergy services while the Rector is disabled.*

MODEL

COMMENTARY

**Section C. Expenses**

The Vestry shall pay the following expenses incurred by the Rector in fulfilling the duties of office:

- (1) Travel expenses, at the rate of \$. \_\_\_\_\_ per mile (to be reviewed annually against actual cost) plus out-of-pocket costs of parking fees, tolls, bus fares, etc.
- (2) The normal expenses of the church's office operation, such as telephone, postage, office equipment, supplies, secretarial services, etc.
- (3) An expense allowance (up to \$ \_\_\_\_\_ annually) for reimbursement of expenses incurred in the course of professional activities on behalf of \_\_\_\_\_ Church.
- (4) The cost of a telephone in the Rector's residence. This telephone number shall be published to insure the Rector's ready accessibility in case of emergencies. The Rector shall pay the cost of all personal long distance calls.

*Expense payments are not compensation. They are reimbursement of the cost of performing the parish's ministry. A parish that does not provide for expenses causes the Rector to suffer a pay cut to the extent unreimbursed expenses are incurred.*

*The Model suggests one way to deal with travel expenses when clergy provide their own transportation. In other cases, the parish either owns or leases an automobile, and maintains it, for the Rector's professional use.*

*Church office expenses are generally in the category of "things taken for granted". But, since one of the reasons for a Letter of Agreement is to spell such things out to lessen the chance of later conflict, it is advisable to include this item.*

*Typical items charged against an expense allowance include: official entertainment of parishioners and parish guests, such as a visiting preacher; dues to professional associations; subscriptions to professional journals; purchase of vestments; child care when both Rector and spouse are expected to be present at some parish event. The parties to a Letter of Agreement may wish to change the language of this provision in order to itemize any particular expenses that may apply to their special situation.*

*The widespread practice of providing a telephone in the Rector's residence is to give parishioners easy access to their pastor.*

**MODEL**

**Section C. Expenses (continued)**

(5) A Professional Development Allowance of at least \$\_\_\_\_\_ per year, to be reviewed annually, set aside in a special account, and paid to or on behalf of the Rector toward expenses incurred in relation to professional development leave. Unexpended portions of this allowance shall be allowed to accumulate for use in succeeding years up to six years.

**Section D. Discretionary Fund**

In accordance with the Canons of the General Convention, a Discretionary Fund is to be established under the Rector's sole control, from the following sources: \_\_\_\_\_

\_\_\_\_\_, and gifts given the Rector for the purposes of the Discretionary Fund.

**COMMENTARY**

*The Model's provision concerning a Professional Development Allowance is a paraphrase of a diocesan policy statement. Any such local policy should be reflected in the Letter of Agreement.*

*Canon law provides the basis for a Rector's Discretionary Fund:*

The Alms and Contributions, not otherwise designated, at the Administration of the Holy Communion on one Sunday in each calendar month, and other offerings for the poor, shall be deposited with the Member of the Clergy in charge of the Congregation or with such Church officer as the Member of the Clergy in charge shall appoint to be applied to such pious and charitable uses as shall be thought fit by the Member of the Clergy. When a parish is without a Rector the Vestry shall appoint a responsible person to serve as Almoner.

*—Title III, Canon 14.2(f)*

*Such a fund is a direct, personal part of a Rector's ministry. Strict confidentiality must be maintained as to the "pious and charitable uses" to which it is put. A discretionary fund may be a designated account on the books the parish, or it may be a separate, specially-titled bank account. That account is usually controlled solely by the Rector, though sometimes the Rector will*

**MODEL**

**COMMENTARY**

**E. Supplementary Compensation**

The Rector shall not charge fees for performing any rites of the Church (for example, baptisms, marriages, funerals) for members of \_\_\_\_\_ Church. The Rector may, however, receive income from other sources, such as:

Sacramental services on behalf of persons not in any way related to \_\_\_\_\_ Church.

Fees and honoraria for professional services performed on personal time for groups unrelated to \_\_\_\_\_ Church, or for sermons, books or articles published outside the parish.

<b>Additional Wording for Special Circumstances</b>
The Rector may engage in income producing activities up to a total of ____ days per year, which shall not be counted against any leave time.
<b>End of Additional Wording</b>

*appoint another person to have signature authority in case of emergency. It is also wise for the Rector to share with at least one Warden or other Vestry member the nature of his/her stewardship of the Fund.*

*Many parishes meet the funding requirements of this canon by a monthly contribution from the operating budget to the discretionary fund. In some cases, special endowments contribute additional income. It is wise to spell out any such local funding customs in the Letter of Agreement.*

*Although national canons lack such language, the canons of many dioceses provide that "it shall be the Vestry's duty . . . to provide for the Minister's maintenance". The Model's section on supplementary compensation is based on this principle, under which "stole fees" for sacramental services within the parish are inappropriate. But a Rector may appropriately earn income from sources outside the parish. This provision does not prohibit a Rector's receiving gifts from parishioners.*

*For tax accounting purposes the Rector must keep a record of such supplementary compensation. S/he may wish to make that accounting available to the Vestry upon request. It is wise to establish a standard of openness on this matter.*

*When a parish is unable to pay a full stipend, the Vestry may encourage the Rector to earn substantial supplemental income. This additional language is suggested for such cases. Specific details may be needed for clarity in local circumstances.*

**MODEL**

**Section F — Use of Buildings**

In addition to use and control of the Church and Parish buildings for the discharge of the duties of the Rector's office, as provided by canon law, the Rector shall have the right to grant use of the buildings to individuals or groups from outside the parish, following guidelines approved by both Rector and Vestry.

**Section G — Mutual Ministry Review**

The Rector, Wardens and Vestry agree to an annual discussion and mutual review of the total ministry of the parish, in order to:

Provide the Rector, Wardens, Vestry opportunity to assess how well they are fulfilling their responsibilities to each other and to the ministries they share.

Establish goals for the work of the parish for the coming year.

Isolate areas of conflict or disappointment which have not received adequate attention and may be affecting mutual ministry adversely.

Clarify expectations of all parties to help put any future conflicts in manageable form.

**COMMENTARY**

*National canon law gives the Rector wide latitude over parish property:*

For the purposes of the office and for the full and free discharge of all functions and duties pertaining thereto, the Rector shall, at all times, be entitled to the use and control of the Church and Parish buildings with the appurtenances and furniture thereof.

—Title III, Canon 14.1(c)

*The Model suggests a procedure to administer of any use of buildings that may go beyond the scope of the canon.*

*Review of ministry is a sensitive issue, filled with vexing problems. Planned for or not, evaluation does go on — at myriad levels. Over the past several years many people in many denominations have devoted much effort to learn how to make ministry review a helpful, constructive process. One thing has become very clear: failure to plan carefully for constructive review often leads to destructive, eruptive processes.*

*Paul wrote that "we, though many, are one body in Christ, and individually members one of another" (Romans 12:5). Ministry is, and must be, mutual. Therefore, no individual's performance can fairly be reviewed apart from the whole.*

*These principles, intentionality and mutuality, are at the core of the Model's provisions for ministry review.*

**MODEL**

**COMMENTARY**

**Section G — Mutual Ministry Review  
(continued)**

A mutually agreed upon third party will be engaged to facilitate the mutual ministry review process.

*Some models for letters of agreement link ministry review to merit adjustments in compensation. But experience suggests it is wise to separate the review process from the budget process. It is best to conduct mutual ministry review in an atmosphere free of budgeting pressures.*

*A facilitator or consultant for mutual ministry review frees all parties to be more open and supportive to one another, and can help them avoid pitfalls they might otherwise stumble into. Some experts believe no review is better than review without an outside facilitator. A facilitator may be hired on a contract basis, or arrangements might be made with a member of diocesan staff, or on a sharing basis with staff or members of a neighboring congregation.*

*Appendix B offers additional guidance for mutual ministry review.*

**Section H — Other Agreements**

- (1) All moving and travel expenses incurred in making the move from \_\_\_\_\_ to \_\_\_\_\_ shall be paid by \_\_\_\_\_ Church. Moving expenses shall include family travel, transporting household goods, reasonable temporary accommodations during the move, and an Incidental Expenses Allowance of up to two weeks' compensation (\$\_\_\_\_\_). \_\_\_\_\_ Church shall also reimburse the Rector for all additional Federal and State Income Taxes which may result from such expense reimbursement.

*It is standard practice in the Church for the parish to pay moving and travel expenses at the start of a new Rectorship.*

**MODEL**

**COMMENTARY**

**Section H — Other Agreements (continued)**

- (2) The moving date shall be in the week of \_\_\_\_\_. The Rector shall begin duties in the parish not later than \_\_\_\_\_, unless delayed by adverse circumstances.
- (3) All pay and benefits shall become effective on \_\_\_\_\_.
- (4) This Letter of Agreement, and its related Position Description, shall be made part of the minutes of the next Vestry meeting following its signing, and copies shall be given to each new Vestry member.
- (5) In the event of the Rector's death, the Vestry agrees to continue payment of the Rector's cash salary, and appropriate Health and Hospital Insurance, to the Rector's surviving direct dependents for a period of \_\_\_\_ months.

*To build in time to move household goods before ministry duties actually begin enables a focused and orderly ministry start-up.*

*Effective date for pay and benefits needs to be coordinated with the Rector's former position, to insure continuity of insurance coverage (particularly health insurance) and credited service in Church Pension Fund records.*

*An important purpose of a Letter of Agreement is to prevent future misunderstandings by getting significant financial and legal details of the pastoral relationship down on paper. Therefore the Letter of Agreement must be available to all Vestry members, current and future.*

*The death of a family's active breadwinner is always deeply traumatic. Clergy families are not immune to that trauma, which is particularly complicated when the family lives in church-owned housing. As a practical matter, it would be relatively easy for a parish to continue to provide a Rector's survivors income for an agreed period. Such an agreement would give the family a measure of security at a difficult time. The Vestry can provide financially for this contingency through "Key Man Insurance".*

**Alternate Wording for Church-Provided Housing**

- (5) In the event of the Rector's death, the Vestry agrees to continue to provide the Rector's surviving direct dependents with the Rector's cash stipend and the use of the Rectory as agreed to in Section B, and appropriate Health and Hospital Insurance, for a period of \_\_\_\_ months. Continued use of the Rectory beyond this term shall be subject to agreements entered into during the term.

**End of Alternate Wording**



## APPENDIX A — ON WRITING POSITION DESCRIPTIONS

"I'm never told the expectations, it seems, until after I have failed to meet them." This painful cry came from a loving and competent pastor in the first year of ministry in a warm, friendly congregation. Lack of clarity "up front" can cause much pain and conflict within a congregation -- or for that matter, any group of people, whether it be family, club, local school board, factory or business office.

One way to achieve clarity is to work out a position description. A frequent approach is to list all the duties anyone can think of that the position entails. For a Rector, people usually search Diocesan and National canons, the Book of Common Prayer, and local parish by-laws as sources.

The trouble is, the result can seem rather dry, technical and general. A common sense review of such a list often shows that its items vary greatly in importance -- but the list itself does not help to make appropriate distinctions. Besides, a list of duties like that often leaves out important, overarching things that make all the difference in a particular congregation's life.

What follows tells how to write a position description that avoids the duty list approach, and reflects the distinctive nature of each local situation. The outline provides a convenient and helpful way to put significant things up front, to judge the relative importance of various activities, and to make expectations clear ahead of time so that more people can get satisfaction from the job's getting done. Following the outline are sample position descriptions, which may be useful starting points for applying the outline to specific situations.

The outline and sample position descriptions are based on a major study of clergy position descriptions and performance evaluation.\* The year-long study was funded by The Episcopal Church Foundation, and conducted in 1971-72 under the sponsorship of the clergy association of the Diocese of Pennsylvania, with the guidance of Hay Associates, a management consultant firm with internationally recognized expertise in personnel administration.

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\*Published as *The Development of Stipend Standards and Performance Criteria for The Episcopal Clergy in the Diocese of*

*Pennsylvania, August 1972* and now out of print. Most of the sample position descriptions are modified from that study. They are used here by permission of the copyright owners: PRIDE, Inc., the clergy association in the Diocese of Pennsylvania.

# MODELS FOR WRITING POSITION DESCRIPTIONS

## POSITION DESCRIPTION OUTLINE

*Title: Name of Institution*

### OBJECTIVE

Why this position exists.

### DIMENSIONS

Some of the "hard data" surrounding this position, such as number of households in the congregation, size of budget, etc.

### NATURE & SCOPE

Formal authority vested in this position.

Sociological environment of this position.

Formal qualifications for this position.

Typical challenges in this position.

Typical resolutions to challenges.

Principal working relationships within the institution.

### ACCOUNTABILITIES

Goal-oriented activities: the key things (no less than four, or more than eight) that have to get done in order to meet the Objective of this position. These accountability statements may then be used to set specific targets for later performance review.

### *MODEL POSITION DESCRIPTIONS OFFERED*

Vicar — Small Town Mission	Assistant Rector — Program Church
Rector — Suburban Church	Organist & Choir Director
Rector — Downtown Church	Parish Secretary
Diocesan Senior Staff Member	

## POSITION DESCRIPTION

### *Vicar — Small Town Mission*

#### **Objective**

To lead the congregation so that, through its total life, the parishioners may know and share Christ, and so that the mission as an institution is not defeated by its small size and history of isolation.

#### **Dimensions**

Households: \_\_\_\_\_

Annual spending: \_\_\_\_\_

\_\_\_\_\_ Local support

\_\_\_\_\_ Beyond congregation

Average Attendance,

4 Key Sundays: \_\_\_\_\_

Weekly Giving per Household: \_\_\_\_\_

#### **Nature and Scope**

The Vicar is the sole staff member, priest, pastor, executive and manager of this congregation, responsible directly to the Bishop and Diocesan authorities and indirectly to the Mission Committee (Vestry) of the congregation. Volunteer lay leaders assist the Vicar by helping with Church School, social and community programs and with the physical and financial management of the church. The congregation elects a Warden to be the key lay person.

The community in which the Mission is set has reasonably identifiable boundaries. Residents tend to earn and to spend their incomes and to get most of their services locally. There is a mixture of income levels, housing and occupations. This "village church" ministers to a limited number of Episcopalians. It has had a rapid turnover of clergy. Prospects for growth, financial resources, and leadership resources are limited. These forces have produced a strong in-group loyalty; therefore merger with another congregation does not seem to be a viable option.

The Vicar must meet the minimum requirements for education and training of the clergy. In addition, the Vicar must be able to work with people on an intense, individual basis and must be able to tolerate the frustrations inherent in the congregation's situation.

The principal challenge of the position is to arouse individual and group interest in community and broader Church work so that programs which hold the promise of growth are developed and carried out. This often necessitates fighting apathy and helping people to make hard decisions.

In meeting his/her objective and responding to this basic challenge, the Vicar works as a consultant and trainer to the lay leaders. S/he works directly with the Church School teachers and with the leaders of such groups as the Altar Guild, Youth Group, and Acolytes. Getting the people to accept challenge calls for a one-to-one pastoral role. Pastoral work also requires marital counseling, helping youth in trouble, and arranging aid for the poor and needy.

The property committee of the Mission Committee arranges for the care of the church building and grounds. The Vicar is often active in this work by hiring itinerant labor for miscellaneous jobs. The Vicar frequently does the Mission's secretarial chores; however, volunteer help is also used. An elected Treasurer normally keeps the financial records.

The community expects the Vicar to contribute leadership to local programs. These also offer an opportunity for the Vicar to get the congregation involved in community affairs.

Although the Vicar is subject to direction from diocesan authorities, the Mission is in fact free to develop and carry out its own program. The Vicar seeks "central office assistance" when a serious problem develops and when local church plans are in conflict with diocesan mission strategy.

### **Accountabilities**

1. Lead worship, preach the Gospel, and administer the sacraments, so that the congregation is given opportunity for spiritual renewal and exciting response to Christ.
2. Provide for pastoral care of the parishioners, so that individual and family joys, anxieties, and distress are met with Christian concern.
3. Guide lay leaders and the congregation in establishing goals to which the parish can respond, so that its viability is assured.
4. Motivate lay leaders to develop and implement programs, so that their performance results in the fulfillment of established goals.
5. Challenge the congregation to recognize the needs of others, so that its members respond with their time, abilities, and money within and beyond the parish.
6. Provide a Christian education program through which persons of all ages will learn the content of the Faith and its application to daily living.
7. Participate in community, deanery, and diocesan activities, so that the mission of the congregation beyond itself is furthered.
8. Maintain a pattern of life that sets a wholesome Christian example.

## POSITION DESCRIPTION

### *Rector — Suburban Church*

#### **Objective**

To lead to the congregation so that, through its total life, the parishioners know and share Christ, and so that the parish as an institution participates in community and diocesan life.

#### **Dimensions**

Households: \_\_\_\_\_

Annual spending: \_\_\_\_\_

\_\_\_\_\_ Local support

\_\_\_\_\_ Beyond congregation

Average Attendance,

4 Key Sundays: \_\_\_\_\_

Weekly Giving per Household: \_\_\_\_\_

#### **Nature and Scope**

The Rector is the Principal Pastor and the Chief Executive of this parish, responsible to the Vestry (which the Rector leads as President) and indirectly to the Bishop, in accordance with the Canons of the Church. Directly reporting to the Rector, and serving at his/her pleasure, are full-time paid staff members -- Sexton and Secretary -- and a part-time paid Organist-Choir Director. A small number of parishioners volunteer to share in the administration of the parish. The Rector works with the Vestry, its officers and committees on local policy matters. The Rector functions in relation to other organizations of the parish as a recruiter of volunteers, consultant on process and content, and educator and enabler (when required) of each organization in its efforts to define and carry out its tasks. S/he may exercise the right of veto on all matters relative to the spiritual welfare of the parish.

The Rector also represents the parish to the community and the larger Church, serving in community organizations, ministerial association, deanery, and diocesan organizations. S/he is chief liturgist of the parish, conducting worship and preaching regularly, and pastoral counselor, principally serving in situations of family life crises, both joyous and grievous, as well as on occasions such as baptism and marriage.

The congregation is set in a comfortable "middle America" bedroom community, the major concern of which is raising children and remaining unspotted by urban problems. Many people go away on weekends. The education level is high; income is above midrange. The congregation capitalized on the growth of the 1950's, has adequate plant, and a good leadership pool. However, prosperity for the parish peaked in the mid-60's. Its population, which has been homogeneous ethnically and economically, is shifting, resulting in a sense of threat. The parish population is growing older.

The Rector must have above average educational achievement, skill as a preacher, previous parochial experience, a high degree of social affability and awareness, and ability to deal creatively with change and conflict both on the human relations level and in the larger societal context.

Typical challenges the Rector faces in meeting his/her objective are: Parish attitudes of alienation and indifference toward denominational policy and program. A strong minority view within the parish which resists change and expects the church to support this attitude -- and is angered whenever it fails to do so. A financial crunch, brought on by inflation coupled with the decreasing membership base of the parish.

In meeting these challenges, the Rector attempts to increase the depth and breadth of the participation of laity in leadership roles, and to share with them the administration of the parish. S/he serves as a communications and interpretation link between the parish and the larger Church. S/he provides pastoral support, and review and evaluation for those to whom leadership has been delegated.

In all parish work the Rector works closely with the Vestry, which oversees all aspects of managing the physical and financial resources of the parish as well as providing the central point of lay coordination of parish goals, priorities, and programs.

### **Accountabilities**

1. Lead worship, preach the Gospel, and administer the sacraments, so that the congregation is given opportunity for spiritual renewal and exciting response to Christ.
2. Provide for pastoral care of the parishioners, so that individual and family joys, anxieties, and distress are met with Christian concern.
3. Guide staff, lay leaders and the congregation in establishing goals to which the parish can respond, so that its viability is assured.
4. Motivate lay leaders and staff to develop and implement programs, so that their performance results in the fulfillment of established goals.
5. Challenge the congregation to recognize the needs of others, so that its members respond with their time, abilities, and money within and beyond the parish.
6. Provide a Christian education program through which persons of all ages will learn the content of the Faith and its application to daily living.
7. Participate in community, deanery, and diocesan activities, so that the mission of the congregation beyond itself is furthered.
8. Maintain a pattern of life that sets a wholesome Christian example.

## POSITION DESCRIPTION

### *Rector — Downtown Church*

#### **Objective**

To lead the congregation so that, through its total life, the parishioners know and share Christ, and so that the parish as an institution exerts positive leadership in the city and diocese.

#### **Dimensions**

Households: \_\_\_\_\_

Annual spending: \_\_\_\_\_

\_\_\_\_\_ Local support

\_\_\_\_\_ Beyond congregation

Average Attendance,

4 Key Sundays: \_\_\_\_\_

Weekly Giving per Household: \_\_\_\_\_

#### **Nature and Scope**

The Rector is the Principal Pastor and the Chief Executive of this parish, responsible directly to the Vestry (which the Rector leads as President) and indirectly to the Bishop, in accordance with the Canons of the Church. Directly reporting to the Rector, and serving at his/her pleasure, are full-time paid staff members -- an Associate Rector, Parish Secretary, and Sexton -- and part-time staff members -- Financial Secretary and Organist-Choir Director. The Rector works with the Vestry and its committees on local policy matters, and, more intimately, with the Senior and Junior Wardens, with whom the Rector serves as Executive Committee of the Vestry. The Rector functions in relation to other organizations of the parish as a recruiter of volunteer leaders, consultant on process and content, and educator and enabler (when required) of each organization in its efforts to define and carry out its tasks. S/he may exercise the right of veto on all matters relative to the spiritual welfare of the parish.

The Rector also represents the parish to the community and the larger church, serving on boards of trustees, ministerial association, deanery, and diocesan organizations. S/he is chief liturgist of the parish, conducting worship and preaching regularly, and pastoral counselor, principally serving in situations of family life crises, both joyous and grievous, as well as on occasions such as baptism and marriage. Due to the parish location and high percentage of elderly persons in the parish the Rector spends a great deal of time in calling on the sick and shut-in.

The parish is downtown, set in a mixture of commercial properties, urban renewal projects, and deteriorating housing. The congregation's membership is drawn from a wide geographical area; most of the people commute considerable distance for worship and other parish activities.

The parish self-image is that it is in "a class by itself". The congregation once was a center of power in the life of the city and of the diocese. To some extent this is still true, but decline in influence and size has set in. The parish now depends heavily on endowment income. Its sociological situation is symbolized by its physical plant, once visibly outstanding in the community but now overshadowed by surrounding structures and cast into sharp contrast to the surrounding neighborhood.

In addition to the usual theological training and educational background required of all clergy, the Rector should have the background and the presence to function in inherited community responsibilities and institutional associations. The Rector also needs management skills for supervising a relatively large parish staff.

The basic challenge of the position is to keep the parish alive in every sense: to involve members in the life and activity of the parish beyond mere attendance at worship, and to use the parish's location and heritage creatively in the city's life.

To meet this challenge, the Rector is free to act in any way s/he feels is consonant with the nature and mission of the church. The traditions and make-up of the parish are such that the Rector makes most decisions with very little consultation beyond a small group of advisers.

### **Accountabilities**

1. Lead worship, preach the Gospel, and administer the sacraments, so that the congregation is given opportunity for spiritual renewal and exciting response to Christ.
2. Provide for pastoral care of the parishioners, so that individual and family joys, anxieties, and distress are met with Christian concern.
3. Guide staff, lay leaders and the congregation in establishing goals to which the parish can respond, so that its viability is assured.
4. Motivate lay leaders and staff to develop and implement programs, so that their performance results in the fulfillment of established goals.
5. Challenge the congregation to recognize the needs of others, so that its members respond with their time, abilities, and money within and beyond the parish.
6. Provide a Christian education program through which persons of all ages will learn the content of the Faith and its application to daily living.
7. Participate in community, deanery, and diocesan activities, so that the mission of the congregation beyond itself is furthered.
8. Maintain a pattern of life that sets a wholesome Christian example.

## POSITION DESCRIPTION

### *Diocesan Senior Staff Member*

A diocesan staff member may be either a program specialist to whom specific responsibilities are delegated, or a generalist-assistant who combines competence in a specific area with ability to carry out a variety of tasks as a member of a team. The specialists are usually found where diocesan ministry is organized along departmental lines. The generalists are found where the senior posts form a secretariat or cabinet. This position description is written for such a situation, where the Bishop has selected a Cabinet of lay persons and clergy, each of whom has special gifts and responsibilities, but who collectively share the whole ministry of the Office of the Bishop.

#### **Objective**

To assist the Bishop in the Bishop's administrative, pastoral, and prophetic ministry, to develop and carry out a Diocesan program as authorized by Convention, and to respond to requests for help from parishes and clergy as far as it may be possible to do so, in order to promote the fulfillment of Diocesan goals and objectives.

#### **Dimensions**

Annual Diocesan Budget: \_\_\_\_\_ Congregations in Diocese: \_\_\_\_\_  
\_\_\_\_\_ Self-Supporting  
\_\_\_\_\_ Aided

Clergy in Diocese: \_\_\_\_\_  
\_\_\_\_\_ Parochial  
\_\_\_\_\_ Non-Parochial  
\_\_\_\_\_ Secularly Self-Supporting

Households in Diocese: \_\_\_\_\_  
\_\_\_\_\_ Communicants  
\_\_\_\_\_ Baptized Persons

#### **Nature and Scope**

The Senior Staff Member is accountable directly and vertically to the Bishop, horizontally to colleagues on the Cabinet, and only indirectly (through the Bishop) to the Council and Convention of the Diocese.

First claim upon his/her time is participation in Cabinet meetings, at which administrative decisions are made and where s/he assists in the development of Diocesan policy.

The Senior Staff Member spends at least half of his/her energies on specific areas of administrative responsibility assigned by the Bishop. In addition, s/he provides liaison and coordination services as the Bishop's representative for a number of boards and committees. S/he spends part of his/her time in the field, consulting with the lay and clerical leadership of parishes and missions. S/he also may serve on national or inter-diocesan committees and assist the Bishop in ecumenical relations in the Diocese.

### *Diocesan Senior Staff Member, continued*

The Bishop, Cabinet colleagues, and secretarial and other ancillary staff (bookkeeper, switch-board operator, etc.) support the Senior Staff Member's work. S/he also calls upon persons within the Diocese, the community, and the Church outside the Diocese as resources in his/her work.

The Senior Staff Member must have broad and deep experience in the life of the Church, both administratively and pastorally. S/he must be able to deal effectively with a wide variety of lay persons and clergy, with differing theological and political points of view. S/he must have at least an elementary knowledge of finance and budget building, and special experience or training in liturgics and ecumenics.

In the conduct of his/her office, the Senior Staff Member serves as the Diocesan Office delegate to eight major policy and/or administrative boards within the Diocese. S/he also exercises direct supervision and pastoral oversight for a definite segment of Diocesan life (e.g. supervision of the several aided parishes and missions and the clergy thereof). Further, s/he may serve at the National Church or ecumenical level on several major boards or committees.

#### **Accountabilities**

1. Participate in the development of administrative policy of the Diocese, so that goals set by Council, Convention, or the Bishop may be achieved.
2. Exercise administrative and pastoral oversight of definite parts of the Diocese, so that the persons working therein are enabled to minister effectively.
3. Provide support of assigned Diocesan boards, so that the Office of Bishop is represented thereon and the boards may function effectively.
4. Represent the Bishop's office or the Diocese beyond the confines of the Diocese, so that the witness of the Diocese may be extended.
5. Maintain a pattern of life that sets a wholesome Christian example.

**POSITION DESCRIPTION**  
*Assistant Rector — Program Church*

**Objective**

To assist the Rector in providing leadership to the congregation so that the goals and purposes of the parish are achieved.

**Dimensions**

Households: \_\_\_\_\_

Annual spending: \_\_\_\_\_

\_\_\_\_\_ Local support

\_\_\_\_\_ Beyond congregation

Average Attendance,

4 Key Sundays: \_\_\_\_\_

Weekly Giving per Household: \_\_\_\_\_

**Nature and Scope**

The Assistant Rector is appointed by and accountable to the Rector, and extends and supports the Rector's ministry in the parish, community and diocese. Under the Rector's supervision and authority, the Assistant shares in the responsibilities of pastoral care, education, administration of the Sacraments, and administration of the parish. The Assistant works with other paid and volunteer staff, exercising lead responsibility in tasks and areas assigned by the Rector. The Assistant attends Vestry meetings, and works with Vestry and program committees as assigned.

The Assistant is assigned direct program responsibility in education for children, youth activities, and support of outreach ministries, and acts in a consultative role to the Rector in the rest of parish life. The Assistant is expected to participate in the community's ministerial association, deanery, and diocesan organizations.

The congregation is set in a comfortable "middle America" bedroom community, the major concern of which is raising children and remaining unspotted by urban problems. Many people go away on weekends. The education level is high; income is above midrange. The congregation capitalized on the growth of the 1950's, has adequate plant, and a good leadership pool. However, prosperity for the parish peaked in the mid-60's. Its population, which has been homogeneous ethnically and economically, is shifting, resulting in a sense of threat. The parish population is growing older.

The Assistant must meet the usual standards of theological training required of all Episcopal clergy, and be open to continuing professional development, through both formal conferences and courses and the Rector's mentorship. The Assistant should be able to develop leadership in the areas of parish life in which s/he is assigned particular responsibility.

A major challenge in this position is to help the parish and its members deal with the personal and family fragmentation that goes with the lifestyle of the community in which they are set. The position also challenges the Assistant at a personal level to integrate professional growth with the performance of this ministry.

The weekly staff meeting provides support for meeting these challenges. Staff meetings are times for accountability and planning, and personal and professional support. The Assistant also draws upon the talents and energies of parishioners for both setting and accomplishing the goals of this ministry.

**Accountabilities**

1. Share in leading worship, preaching the Gospel, and administering the sacraments, so that the congregation is given opportunity for spiritual renewal and exciting response to Christ.
2. Recruit, support and train Church School teachers and leaders for youth activities, so that the Church School and youth group operate smoothly and effectively.
3. Support the planning and action of the Outreach Committee, so that goals agreed to this area are accomplished and that ministry celebrated.
4. Share in providing for pastoral care of the parishioners, so that individual and family joys, anxieties, and distress are met with Christian concern.
5. Share establishing parish goals which meet real needs to which the parish can respond, so that its viability is assured and its mission strengthened.
6. Participate in community, deanery, and diocesan activities, so that the mission of the congregation beyond itself is furthered.
7. Maintain a pattern of life that sets a wholesome Christian example.

## **POSITION DESCRIPTION**

### *Organist & Choir Director*

#### **Objective**

To provide creative leadership of a music program that will encourage the congregation in worship that is vital, attractive, and dignified.

#### **Dimensions**

\$\_\_\_\_\_ per annum budget for "Music Department" includes:

\$\_\_\_\_\_ - Routine Piano and Organ Tuning and Maintenance

\$\_\_\_\_\_ - Music, Supplies, Instrumentalists, Vestments

September through May: 8 am Sunday: hymns during Advent and Christmastide

10 am Sunday: choirs at regular "main" service

Two choir rehearsals each week

One or two major choral works to be presented in addition

June through August: 10 am Sunday: hymns and service music plus volunteer soloist or

Organ Offertory each week.

No more than seven "Major Extra Services" during each year.

Includes hymns and service music on Christmas Eve,

Good Friday, All Saints' Day, a "Parish Festival",

Bishop's Visitation.

No more than fifteen "Minor Extra Services" during each year.

Includes hymns and service music on Thanksgiving Day,

Christmas Day, Ash Wednesday, Easter Eve, Ascension Day,

Annual Parish Meeting, Lenten Evening Services.

#### **Remuneration**

Range: \$\_\_\_\_\_ to \$\_\_\_\_\_ per annum, subject to withholding taxes, etc.

\$\_\_\_\_\_ per wedding; presence at rehearsal expected.

\$\_\_\_\_\_ per funeral.

Four weeks summer vacation per annum.

#### **Nature and Scope**

The Organist & Choir Director functions under the direct supervision of the Rector, at whose pleasure s/he serves. S/he exercises the Rector's canonical authority in the area of music, which is delegated by the Rector, and subject to the Rector's review.

## *Organist & Choir Director, continued*

The Organist & Choir Director has the musical instruments and music library of the parish at her/his disposal, as well as, through the Rector, the support of the parish secretarial staff. S/he works directly with volunteer choir personnel, who serve at his/her pleasure. S/he also serves as a resource person to the Vestry and its committees, and when called upon, to the Parish Liturgical Committee.

The chief challenges of the position fall into three areas:

*Personal Relations*, through which choir members are recruited and retained, and the people of the parish are enabled to work with the Organist & Choir Director.

*Liturgical Sensitivity*, through which music is planned for the changing seasons of the Church Year and adapted to the formularies of the Church's worship.

*Musical Technique*, through which the congregation is encouraged to fuller participation in worship and the choirs find satisfaction, growth, and self-expression.

In addition to use of parish facilities in the performance of stated accountabilities and objective, the Organist & Choir Director has those facilities at his/her disposal, on an "as-available" basis, for personal use and for the use of any private students (keyboard or voice).

### **Accountabilities**

To achieve the Objective of this position, the Organist & Choir Director within the limitations imposed by the part-time nature of the position:

1. Selects preludes, hymns, and anthems, planning about six weeks ahead, so that adequate review and preparation may be achieved.
2. Conducts weekly choir rehearsals (in season), so that the choirs may make their offering in worship to the best of their abilities.
3. Maintains records of plans, choir membership, and music library, so that the work may be performed smoothly and efficiently.
4. Confers with the Rector on a regular basis, for an average of one-half hour a week, so that they may work smoothly as a team and so that the Rector may provide supervision.
5. Arranges for substitutes on his vacation (at parish expense) or for personal leave (at his/her expense) or for weddings and funerals at which he chooses not to serve (at fee-payer's expense).
6. Encourages members of the congregation to join the choirs and maintains such personal contact with choir members as time permits, so that the choirs are maintained and, if possible, grow.

## **POSITION DESCRIPTION**

### *Parish Secretary*

#### **Objective**

To assist the Rector, Staff and Congregation in the work that is needed to carry out the ministry of the Church.

#### **Dimensions**

\$\_\_\_\_\_ per annum budget for the office which includes:

Office supplies

Postage

Office equipment and maintenance

Telephone

Office furnishings

Monday through Friday, 8:30 a.m. to 4:30 p.m. 45 minutes daily for lunch. Attend Vestry meeting one evening per month and attend annual meeting one Sunday per year.

Two weeks paid vacation taken at a time convenient to the Rector. Ten sick days, not cumulative. 9½ paid holidays: New Year's Day, Presidents' Day, Good Friday Afternoon, Easter Monday, Memorial Day, Fourth of July, Labor Day, Thanksgiving Day, Thanksgiving Friday, and Christmas Day.

The Parish Secretary attends seminars and workshops, under the direction of the Rector, for the maintenance and improvements of skills required in the position. Time for this in-service education is provided at the Rector's discretion; costs are covered as negotiated on a case-by-case basis.

#### **Remuneration**

\$\_\_\_\_\_ per year, payable on the last day each month.

#### **Nature and Scope**

The Parish Secretary is appointed by and accountable to the Rector, and exercises the Rector's canonical authority in maintaining the Parish Register, the Register of Church Services, and in keeping pastoral records.

The Parish Secretary is first of all the Rector's personal, confidential secretary and administrative assistant. S/he has the office equipment at his/her disposal and oversees equipment maintenance and the inventory of office supplies. S/he coordinates equipment use by other staff members and volunteers. S/he works with volunteer help, supervising and coordinating their activities. S/he serves as liaison between the Rector and members of the staff and congregation, and as a resource person to the Vestry and Vestry commissions, and the Rector's staff.

## *Parish Secretary, continued*

The chief challenges of the position include ...

*Personal Relations:* The Parish Secretary comes in contact with a large portion of the congregation either by telephone or in person and must be able to get along with everyone.

*Team Member:* The Staff serves the ministry of the whole congregation, and the Parish Secretary must be committed to an appropriate vision of that ministry and must work collaboratively with the Rector and Rector's Staff to help the congregation live out that vision.

*Professional Skills and Standards:* The Parish Secretary must be qualified to perform all the usual professional tasks required of any senior level office worker and administrative assistant.

### **Accountabilities**

To achieve the objective of this position, the Parish Secretary must:

1. Support the Rector's ministry through service as a personal secretary, and through administrative and pastoral support tasks, so that the Rector may be freed from desk-bound duties.
2. Support staff and volunteer church workers with regard to secretarial tasks, so they may more readily perform their ministries.
3. Maintain and communicate the master calendar of parish activities, so that the staff and congregation are informed of all parish activities and commitments.
4. Assemble, edit, and mail the weekly newsletter and occasionally write original articles, so that the parish may be kept informed of significant events.
5. Coordinate scheduling and paper work for public worship, Vestry and Commission activities, so that all members and groups in the parish may readily perform their ministries.
6. Maintain accurate official parish records and membership lists, so that an accurate record of the present state of the parish is always available.
7. Oversee maintenance of office equipment and inventory of office supplies, so that administrative tasks may be done without unnecessary delay.

## APPENDIX B — GUIDELINES FOR MUTUAL MINISTRY REVIEW

One way or another it happens. Review and evaluation of ministry always go on at the informal level. In addition, many clergy and congregations have struggled to develop helpful ways to approach ministry review at the formal level.

There is useful ferment in the field; no single model for ministry review seems to satisfy the varying needs of clergy and congregations wanting to engage in it. Nevertheless, some lessons have emerged as general principles to be applied to particular cases:

### **1. Intentionality**

It is more constructive to plan for regular, formal review than to wait for events and evaluative pressures to overtake persons involved in directing to a congregation's ministry.

### **2. Mutuality**

Review is best understood as an exercise in mutual ministry, not an adversarial event. To look at a Rector's performance in isolation from that of the Vestry's, or *vice versa*, encourages defensive, win-lose behavior and feelings.

### **3. Consultation**

Ministry review is generally easier and results are better when a consultant from outside the congregation assists the process. The consultant should be theologically proficient, knowledgeable about congregational life, and skillful in working with groups.

### **4. Continuity**

The review must be set firmly in context. Particulars vary from congregation to congregation, but always include: the theological understanding which undergirds ministry and mission in that congregation; position descriptions of the parties involved; report of the last review, including goals which it set; major events in the life of all parties since the last goals were set.

### **5. Variety**

There are many ways to review ministry. Data can come from routine congregational records, or from special surveys and questionnaires, or from the impressions of a number of selected persons. The review team can be composed in many ways: a special committee of leaders; the Rector and Wardens; the Vestry acting as a committee of the whole; a broad sample of people meeting in retreat. Performance goals can be as varied as the sum of the activities and dreams of the whole congregation, or as singular as "the most important project in our life together". No one method is correct for all circumstances. Many people agree, however, that it is interesting and productive to change approaches every few years.



**6. Simplicity**

Clergy and congregations new to ministry review commonly find that their process seems to run away with them. It is wise to aim for simplicity: only a few goals held up for formal review at each evaluation cycle; performance measurements that are easily administered and clearly understood; a limited number of meetings for the review team, held in a relatively short span of time (e.g., four weeks).

*Beyond these six guidelines, there are other resources, including the following:*

- Most dioceses have staff members experienced in ministry review. Staff in regional offices of other judicatories may be willing to share their experience and their knowledge of local resources.
- The Church Deployment Office of the Episcopal Church provides a detailed discussion of review principles and methods in their pamphlet *Mutual Ministry Review: For Clergy and Parishes* (1988). It may be ordered from them at: 815 Second Avenue, New York, NY 10017-4594.
- The Alban Institute (4125 Nebraska Avenue NW, Washington, DC 20016) continually researches congregations all over the country. Many of its publications offer helpful insights for congregational life, especially the interaction between clergy and laity. *Evaluation Of, By, For and To The Clergy* by Loren B. Mead examines the evaluation process and suggests a healthy approach.
- The Office of Education of Mission and Ministry of the Episcopal Church in 1983 published a *Guide for Congregational Self-Evaluation* which models one useful approach to the subject. Write them at: 815 Second Avenue, New York, NY 10017-4594.

## APPENDIX C — WORKING COPY OF MODEL LETTER OF AGREEMENT

### A LETTER OF AGREEMENT

between

The Wardens and Vestry of

\_\_\_\_\_ Church

and

The Reverend \_\_\_\_\_

who has been elected Rector with the understanding that this tenure is to continue until dissolved by mutual consent or by arbitration and decision as provided by the relevant Canons of the Diocese of \_\_\_\_\_ and of the General Convention.

#### Preamble

The Rector shall lead \_\_\_\_\_ Church as pastor, priest and teacher, sharing in the councils of this congregation and of the whole Church, in communion with our Bishop. By word and action, informed at all times by the Holy Scriptures, the Book of Common Prayer, and the Constitution and Canons of the General Convention and our Diocese, the Rector shall proclaim the Gospel, love and serve Christ's people, nourish them, and strengthen them to glorify God in this life and in the life to come.

This ministry is further described in the Rector Position Description approved by the Rector, Wardens and Vestry on \_\_\_\_\_, which is hereby acknowledged and made part of this Letter of Agreement.

#### Alternate Wording Regarding Position Description

This ministry will be further described in a Rector Position Description which meets the mutual approval of the Rector, Wardens and Vestry, to be completed between the seventh and twelfth month of their ministry together. When the Rector Position Description has been thus completed, it shall be considered a part of this Letter of Agreement.

#### Section A. Times of Work and Leave

- (1) The Rector's work includes not only activities directed to the parish and its well-being, but also labors on behalf of the Diocese and community. The Rector's scheduled workweek is five days, usually measured as ten to twelve units of mornings, afternoons, or evenings in various combinations reflecting the demands of this ministry. In general, no more than three evenings per week are expected. The Rector is expected to preserve at least one continuous twenty-four hour period each week solely for personal and family use.

- (2) The Rector will have the following periods of leave at full compensation:
  - (a) National Holidays, to be taken so as not to interfere with worship for major occasions.
  - (b) One month Annual Vacation, consisting of twenty-three workdays, which shall include five Sundays. No more than \_\_\_\_ days and one Sunday may be carried forward to succeeding years.
  - (c) Professional Development Leave, at the rate of two weeks per year.
  - (d) Two weeks per year of service in this parish for Sabbatical Leave, to be available after the third year, and cumulative through the sixth year. Sabbatical arrangements shall be made in full consultation with the Vestry, to insure benefits for the parish as well as for the Rector.
  - (e) \_\_\_\_ weeks Parental Leave for the period immediately surrounding the birth of a child to the Rector/Rector's wife, beginning at a time decided by the Rector.

**Section B. Compensation**

- (1) The Rector's annual cash salary will be \$\_\_\_\_\_, paid monthly on or before the \_\_\_\_ day of the month, to be reviewed and adjusted annually in light of changes in the \_\_\_\_\_ Consumer Price Index and the current Diocesan minimum clergy salary standard. Upon the Rector's request, the Vestry will designate a portion of the total cash salary as "Housing Allowance" under the Federal Internal Revenue Code.
- (2) The Rector shall receive SECA Reimbursement payments, quarterly before the 15th of April, June, September, and December, according to the following formula:  
\_\_\_\_\_.
- (3) The Vestry shall pay the following benefits:
  - (a) Church Pension Fund Assessment on the sum of the Rector's total annual cash salary (including Housing Allowance), plus the Rector's SECA Reimbursement.

<b>Alternate Wording for Church-Provided Housing</b>
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<p><b>Section B. Compensation (Alternate)</b></p>
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- |  |
|--|
| <ul style="list-style-type: none"><li>(1) The Rector's annual cash salary will be \$_____, paid monthly on or before the ____ day of the month, to be reviewed and adjusted annually in light of changes in the _____ Consumer Price Index and the current Diocesan minimum clergy salary standard. Upon the Rector's request, the Vestry will designate a portion</li></ul> |
|--|

of the total cash salary as "Housing Allowance" under the Federal Internal Revenue Code.

**Section B. Compensation (Alternate, continued)**

- (2) The Rector shall have full use of the Rectory at \_\_\_\_\_ as personal residence. No parish activities will be planned at the Rectory without the invitation of the Rector's household. Expenses connected with the Rectory shall be handled as follows:
- (a) Utilities shall be contracted for and paid directly by the Vestry.
  - (b) Expenses for repair, remodeling and major appliances shall be paid by the parish in accordance to an annual plan and budget mutually agreed to by the Rector and Vestry. Within that plan and budget, the Rector may authorize such expenditures, up to \$\_\_\_\_\_ monthly, reporting them within ten days to the Vestry.
  - (c) Use and maintenance of Rectory grounds are at the Rector's discretion and personal expense, with the exception of major alterations to the basic landscaping plan, and such grounds maintenance items as may be included in the annual plan and budget referred to in sub-paragraph (b) above.
- (3) The Rector shall receive SECA Reimbursement payments, quarterly before the 15th of April, June, September, and December, according to the following formula:  
\_\_\_\_\_  
\_\_\_\_\_.
- (4) The Vestry shall pay the following benefits:
- (a) Church Pension Fund Assessment on the sum of: the Rector's annual cash stipend; the Rector's SECA Reimbursement; the actual cost of Rectory utilities; and the value of the use of the Rectory according to the Church Pension Fund formula.

(b) Health and Hospital Insurance (HHI), equivalent to or better than the group plan provided through the Diocese.

**Additional Wording for Special Cases**

If equivalent or better HHI is provided independently through the employment of the Rector's spouse, the Rector may sign a waiver to forgo the Diocesan HHI plan. The Vestry will then not provide duplicate coverage but will use the amount of the Diocesan HHI premium as follows: \_\_\_\_\_.

If at any time the Rector revokes the waiver, the Vestry will provide HHI in accordance with the Diocesan plan.

(c) Group Life and Accidental Death and Dismemberment Insurance, equivalent to or better than the group plan provided through the Diocese.

(d) Workers' Compensation Insurance, as provided by State Law.

(e) Income Replacement Insurance, to enable the parish to continue clergy services in the event the Rector, through long-term illness or temporary disability, becomes unable to perform the duties of the office. Insurance proceeds go directly to the Rector, whereupon salary payments are reduced in like amount. The funds thereby released provide supply services to meet parish priestly needs during the Rector's disability. In this event, Pension Fund and SECA Reimbursement payments shall be maintained as if the Income Replacement Insurance were not in effect.

**Section C. Expenses**

The Vestry shall pay the following expenses incurred by the Rector in fulfilling the duties of office:

- (1) Travel expenses, at the rate of \$\_\_\_\_\_ per mile (to be reviewed annually against actual cost) plus out-of-pocket costs of parking fees, tolls, bus fares, etc.
- (2) The normal expenses of the church's office operation, such as telephone, postage, office equipment, supplies, secretarial services, etc.
- (3) An expense allowance (up to \$\_\_\_\_\_ annually) for reimbursement of expenses incurred in the course of professional activities on behalf of \_\_\_\_\_ Church.
- (4) The cost of a telephone in the Rector's residence. This telephone number shall be published to insure the Rector's ready accessibility in case of emergencies. The Rector shall pay the cost of all personal long distance calls.
- (5) A Professional Development Allowance of at least \$\_\_\_\_\_ per year, to be reviewed annually, set aside January 1 each year in a special account, and paid to or on behalf of the Rector toward expenses incurred in relation to Professional Development Leave. Unexpended portions of this allowance shall be allowed to accumulate for use in succeeding years up to six years.

**Section D. Discretionary Fund**

In accordance with the canons of General Convention, a Discretionary Fund is to be established under the Rector's sole control, from the following sources:

\_\_\_\_\_  
\_\_\_\_\_, and gifts given the Rector for the purposes of the Discretionary Fund.

**Section E. Supplementary Compensation**

The Rector shall not charge fees for performing any rites of the Church (for example, baptisms, marriages, funerals) for members of \_\_\_\_\_ Church. The Rector may, however, receive income from other sources, such as:

Sacramental services on behalf of persons not in any way related to \_\_\_\_\_ Church.

Fees and honoraria for professional services performed on personal time for groups unrelated to \_\_\_\_\_ Church, or for sermons, books or articles published outside the parish.

<b>Additional Wording for Special Cases</b>
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The Rector may engage in income producing activities up to a total of ____ days per year, which shall not be counted against any leave time.
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**Section F. Use of Buildings**

In addition to use and control of the Church and Parish buildings for the discharge of duties of the Rector's office, as provided by canon law, the Rector shall have the right to grant use of the buildings to individuals or groups from outside the parish, following guidelines approved by both Rector and Vestry.

**Section G. Mutual Ministry Review**

The Rector, Wardens and Vestry agree to an annual discussion and mutual review of the total ministry of the parish, in order to:

Provide the Rector, Wardens and Vestry opportunity to assess how well they are fulfilling their responsibilities to each other and to the ministries they share.

Establish goals for the work of the parish for the coming year.

Isolate areas of conflict or disappointment which have not received adequate attention and may be affecting mutual ministry adversely.

Clarify expectations of all parties to help put any future conflicts in manageable form.

A mutually agreed upon third party shall be engaged to facilitate the mutual ministry review process.

**Section H. Other Agreements**

- (1) All moving and travel expenses incurred in making the move from \_\_\_\_\_ to \_\_\_\_\_ shall be paid by \_\_\_\_\_ Church. Moving expenses shall include family travel, transporting household goods, reasonable temporary accommodations during the move, and an Incidental Expenses Allowance of up to two weeks' compensation (\$\_\_\_\_\_). \_\_\_\_\_ Church shall also reimburse the Rector for all additional Federal and State Income Taxes which may result from such expense reimbursement.
- (2) The moving date shall be in the week of \_\_\_\_\_. The Rector shall begin duties in the parish not later than \_\_\_\_\_, unless delayed by adverse circumstances.
- (3) All pay and benefits shall become effective on \_\_\_\_\_.
- (4) This Letter of Agreement, and its related Position Description, shall be made part of the minutes of the next Vestry meeting following its signing, and copies shall be given to each new Vestry member.
- (5) In the event of the Rector's death, the Vestry agrees to continue payment of the Rector's Cash Salary, and appropriate Health and Hospital Insurance to the Rector's surviving direct dependants for a period of \_\_\_\_ months.

<b>Alternate Wording for Church-Provided Housing</b>	
(5)	In the event of the Rector's death, the Vestry agrees to continue to provide the Rector's surviving direct dependants with the Rector's cash stipend and the use of the Rectory as agreed to in Section B, and appropriate Health and Hospital Insurance for a period of ____ months. Continued use of the Rectory beyond this term shall be subject to agreements entered into during the term.

- (6) This letter may be revised only by mutual agreement at the time of the annual mutual ministry review, except that compensation and expenses revisions shall be mutually agreed upon in a separate budget process.
- (7) If the Rector and Vestry disagree concerning interpretation of this Letter of Agreement, either party may appeal for mediation to \_\_\_\_\_, or another mutually agreed upon third party, the Bishop remaining the final arbiter.

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Rector*

\_\_\_\_\_  
*Senior Warden*

*Reviewed* \_\_\_\_\_  
*Archdeacon*

*Approved* \_\_\_\_\_  
*Bishop*

## APPENDIX D — INTERIM PASTOR MODEL LETTER OF AGREEMENT

*After the 1983 first edition of this handbook, a demand emerged to adapt the Model Letter of Agreement for use with Interim Pastors. The model below also appears in the author's Choosing to Serve: Resources for the Calling Process, published by The Church Deployment Board of The Episcopal Church. It draws heavily on two Alban Institute publications, Ralph Macy's The Interim Pastor, and Philip Porcher's What You Can Expect from An Interim Pastor.*

### INTERIM PASTOR LETTER OF AGREEMENT

between

The Wardens and Vestry of

\_\_\_\_\_ Church

and

The Reverend \_\_\_\_\_

who has been appointed Interim Pastor with the understanding that this tenure shall continue at least \_\_\_\_ months until shortly before the arrival of the new Rector, unless earlier dissolved by mutual consent or upon sixty days' notice of either party.

#### **Developmental Tasks of the Interim Period**

The present interim in settled pastoral leadership is seen as prime time for renewal, reenergizing the parish in its life and mission. Beyond maintaining effective ministry during this period, the Vestry and Interim Pastor shall work together to prepare for healthy transition to the next rectorship. Specific tasks to be addressed include:

Coming to terms with the history of this congregation and its relationships with previous clergy.

Discovering the congregation's special identity, what it dreams of being and doing apart from previous clergy leadership.

Dealing with shifts in leadership roles that naturally evolve in times of transition, allowing new leaders to come to the fore constructively.

Renewing and reworking relationships with the diocese, so that each may be a more effective resource and support to the other.

Building commitment to the leadership of the new rector in order to be prepared to move into the future with openness to new possibilities.

**Vestry Responsibilities**

All ministries other than those reserved to ordained leadership (such as administering the sacraments) are understood as mutual ministries of the laity of the parish and the Interim Pastor. The Vestry shall lead the laity to support and cooperate with the Interim Pastor in pursuit of parish goals and in the performance of the developmental tasks of the interim period.

The Vestry is legal agent for the parish in all matters concerning its corporate property and in its relationship with the Interim Pastor. The Vestry will see that the Interim Pastor is properly supported, personally and organizationally as well as in the Vestry's financial obligations to the Interim Pastor.

**Interim Pastor Responsibilities**

The Interim Pastor represents and extends the ministry which is the Bishop's pastoral and canonical responsibility for congregations in leadership transition. The Interim Pastor shall lead \_\_\_\_\_ Church as pastor, priest and teacher, sharing in the councils of this congregation and of the whole church, in communion with our Bishop. The Interim Pastor shall . . .

Work with the Vestry and other lay leaders to maintain the regular schedule of worship services and preaching, education, pastoral care and pastoral offices (weddings, funerals, baptisms), calling upon the sick and shut-in, visiting newcomers, and ongoing administration of the parish.

Supervise all parish staff in the exercise of their responsibilities and ministries, for which they shall be accountable to the Interim Pastor.

Function as Chair of the Vestry, and support the Vestry in its responsibilities.

The major goal of the Interim Pastor's ministry is to prepare the congregation for the coming of the next rector. To this end, the Interim Pastor shall . . .

Help the congregation deal with its grief and any other unresolved issues arising from the rector's departure.

Deal with internal conflicts and help heal any divisions within the congregation.

Help the Vestry, lay leaders and staff make such changes as may be needed to align parish life and administration with generally accepted standards in the diocese.

The Interim Pastor shall communicate regularly with any consultant in the calling process, but shall not work with the Calling Committee as they develop the parish profile, and solicit and screen candidates. The Interim Pastor shall not be eligible to be a candidate for Rector.

<p><b>Possible Addition</b></p>
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<p>This ministry is further described in the Interim Pastor Position Description approved by the Wardens and Vestry on _____, which is hereby acknowledged and made part of this Letter.</p>
--



**Section A. Times of Work and Leave**

- (1) The Interim Pastor's scheduled workweek is five days, which shall include Sunday activities. The Interim Pastor is expected to preserve at least one continuous twenty-four hour period each week solely for personal and family use.
- (2) The Interim Pastor will have the following periods of leave at full compensation:
  - a. National Holidays, to be taken so as not to interfere with worship for major occasions.
  - b. Annual Vacation, at the rate of one month per year, consisting of twenty-three workdays, which shall include five Sundays.
  - c. Professional Development Leave, at the rate of two weeks per year.

**Section B. Compensation**

- (1) The Interim Pastor's cash salary will be \$\_\_\_\_\_, monthly, paid on or before the \_\_\_\_ day of the month. It is understood that, upon the Interim Pastor's request, the Vestry will designate a portion of the total amount as "Housing Allowance" under the Federal Internal Revenue Code.
- (2) The Vestry shall pay the following benefits:
  - a. Church Pension Fund Assessment on the Interim Pastor's annual cash salary (including Housing Allowance).

**Alternate Wording For Church-Provided Housing**

**Section B. Compensation (Alternate)**

- (1) The Interim Pastor's monthly cash stipend will be \$\_\_\_\_\_, paid on or before the \_\_\_\_ day of the month. It is understood that, upon the Interim Pastor's request, the Vestry will designate a portion of the annual cash stipend as "Housing Allowance" under the Federal Internal Revenue Code.
- (2) The Interim Pastor shall have full use of the Rectory at \_\_\_\_\_ as personal residence. No parish activities will be planned at the Rectory without the invitation of the Interim Pastor's household. Expenses connected with the Rectory shall be handled as follows:
  - (a) Utilities shall be contracted for and paid directly by the parish.
  - (b) Use and maintenance of Rectory grounds are at the Interim Pastor's discretion and personal expense, with the exception of major alterations to the basic landscaping plan.

**Section B. Compensation (Alternate, continued)**

(3) The Vestry shall pay the following benefits:

(a) Church Pension Fund Assessment on the sum of: the Interim Pastor's annual cash stipend; the actual cost of Rectory utilities; and the value of the use of the Rectory according to the Church Pension Fund formula.

(b) Health and Hospital Insurance, equivalent to or better than the group plan provided through the Diocese.

(c) Group Life and Accidental Death and Dismemberment Insurance, equivalent to or better than the group plan provided through the Diocese.

(d) Workers' Compensation Insurance, as provided by State Law.

**Section C. Expenses**

The Vestry shall pay the following expenses incurred by the Interim Pastor in fulfilling the duties of office:

(1) Travel expenses, at the rate of \$\_\_\_\_\_ per mile, plus out-of-pocket costs of parking fees, tolls, bus fares, etc.

(2) The normal expenses of the Church's office operation, such as telephone, postage, office equipment, supplies, secretarial services, etc.

(3) An expense allowance (up to \$\_\_\_\_\_ annually) for reimbursement of expenses incurred in the course of professional activities on behalf of \_\_\_\_\_ Church.

(4) The cost of a telephone in the Interim Pastor's residence. This telephone number shall be published to insure the Interim Pastor's ready accessibility in case of emergencies. The Interim Pastor shall pay the cost of all personal long distance calls.

(5) A Professional Development Allowance of \$\_\_\_\_\_.

**Section D. Discretionary Fund**

In accordance with the canons of the General Convention, the Alms/Discretionary Fund, in the absence of a Rector, is under the control of the Parish Almoner. The Senior Warden shall be appointed Parish Almoner, and, together with the Interim Pastor and Junior Warden, shall have access to this fund for the aid of the poor and those in need, and for any other reasonable expense normally attributed to such a canonical Alms/Discretionary Fund.

**Section E. Supplementary Compensation**

The Interim Pastor shall not charge fees for performing any rites of the Church (for example: baptisms, marriage, funerals) for members of \_\_\_\_\_ Church. The Interim Pastor may, however, receive income from other sources, such as:

Sacramental services on behalf of persons not in any way related to \_\_\_\_\_ Church.

Fees and honoraria for professional services performed on personal time for groups unrelated to \_\_\_\_\_ Church, or for sermons, books or articles published outside the parish.

**Section F. Use Of Building**

It is understood that the general pattern of building use followed during the last Rectorship shall be maintained, unless there is specific action of the Vestry to the contrary. The Interim Pastor shall have the right to grant use of the buildings to individuals or groups from outside the parish, only under guidelines approved by the Vestry.

**Section G. Mutual Ministry Review**

There shall be a quarterly discussion and mutual review of the total ministry of the parish, in order to:

Provide the Interim Pastor, Wardens and Vestry opportunity to assess how well they are fulfilling their responsibilities to each other and to the ministries they share.

Evaluate progress on the developmental tasks, and establish and adjust goals for the work of the parish during the interim.

Plan healthy closure for the interim ministry and prepare for the coming of the next Rector.

Isolate areas of conflict or disappointment which have not received adequate attention and may be affecting mutual ministry adversely.

Clarify expectations of all parties to help put any future conflicts in manageable form.

A mutually agreed upon third party shall be engaged to facilitate the mutual ministry review process.

**Section H. Other Agreements**

- (1) All moving and travel expenses incurred in making the move from \_\_\_\_\_ to \_\_\_\_\_ shall be paid by \_\_\_\_\_ Church. \_\_\_\_\_ Church shall also reimburse the Interim Pastor for all additional Federal and State Income Taxes which may result from such expense reimbursement.
  
- (2) The moving date shall be in the week of \_\_\_\_\_. The Interim Pastor shall begin duties in the parish not later than \_\_\_\_\_, unless delayed by adverse circumstances.
  
- (3) All pay and benefits shall become effective on \_\_\_\_\_.
  
- (4) This Letter of Agreement [*and its related Position Description*] shall be made part of the minutes of the next Vestry meeting following its signing, and copies shall be given to each new Vestry member thereafter.
  
- (5) If the Interim Pastor and Vestry are in disagreement concerning interpretation of this Letter of Agreement, either party may appeal for mediation to \_\_\_\_\_, or another mutually agreed upon third party, the Bishop remaining the final arbiter.

Date: \_\_\_\_\_  
\_\_\_\_\_ *Interim Pastor*

\_\_\_\_\_  
*Senior Warden*

*Reviewed:* \_\_\_\_\_  
*Archdeacon*

*Approved:* \_\_\_\_\_  
*Bishop*