



# QUEST

a guide for those involved  
in the search for a bishop

by Charles R. & Lynne Wilson

Findings from a Study of Bishop Election Practices  
in the Episcopal Church

A project

- \* sponsored by the Committee on Pastoral Development of the House of Bishops, Episcopal Church.
- \* funded by grants from the Episcopal Church Foundation and contributions of bishops of the Episcopal Church.

Copyright 1983, CRW Management Services, 6066 Parfet St.,  
Arvada, CO 80004. Printed in U.S.A.

"Exhilarating, exhausting, humbling, time-consuming, intense, agonizing, spiritual impact, awesome, changed lives, deepened perception of ministry and the episcopate . . . these are some of the words we have used to try to describe our experience on the committee. We felt and saw both tears and flashing smiles. Not tears of sorrow or anger, but tears of awe and wonder. Not smiles only of mirth, but also of love. There were times when it seemed one could almost hear the groaning of the Holy Spirit.

I believe the fruits of the committee will reach beyond the election of a Bishop Coadjutor. I believe the ministries that are ours will long be affected by what we have experienced."

-excerpt from a letter to his bishop by a member of a diocesan search committee

quest (kwěst), n. Those who make search  
collectively

WEBSTER'S NEW COLLEGIATE DICTIONARY  
G & C Merriam Co., 1961.

Almighty God, giver of every good gift:  
Look graciously on your Church, and so  
guide the minds of those who shall choose a  
bishop for this Diocese, that we may re-  
ceive a faithful pastor, who will care for  
your people and equip us for our minis-  
tries; through Jesus Christ our Lord.

Amen.

## CONTENTS

Memo to the bishop considering calling for an  
episcopal election

Foreword

|           |  |
|-----------|--|
| Chapter 1 | Getting Started  |
| Chapter 2 | An Information Base                                    |
| Chapter 3 | Screening, Interviewing and<br>Nominating              |
| Chapter 4 | Introducing Candidates and<br>Welcoming the New Bishop |

Additional Resources

Appendices

|   |   |
|---|---|
| A | PERT chart (Western Kansas)   |
| B | Where We Live (Idaho)   |
| C | Who We Are (Idaho)  |
| D | Profile of a Bishop (Idaho)   |
| E | Toward a Position Description<br>(Idaho)                              |
| F | Diocesan Profile (Maryland)   |
| G | Survey Form and Results<br>(Central Gulf Coast)                       |
| H | Form for Proposing Nominees<br>(Adapted from San Diego)               |
| I | Questionnaire and Analysis /<br>Rating Instrument<br>(Western Kansas) |
| J | Letter to Finalists after<br>Second Screening (Idaho)                 |
| K | Letter to Candidates no longer<br>Being Considered<br>(Bethlehem)     |
| L | Survey Responses  |

MEMO

To: The bishop considering calling for an episcopal election

This book has been prepared to assist you and especially your search or nominating committee in the challenging responsibility of leading the diocese through a process of episcopal selection.

We hope you will read it prior to issuing the call as it may contain a suggestion or consideration that, thus far, has not occurred to you, and it may contribute to the way you issue the call or charge the committee.

You may wish to contact the Office of Pastoral Development for suggestions concerning the use of an outside consultant. Such assistance could make a big difference in your committee's work. The committee may, as it gets its work under way, choose not to call on such outside services. However, you have the opportunity now to design a consultant into the first meeting and that may be the best way to expose the committee to the advantages of this service and give them a true choice in the matter.

Best wishes in the task ahead. May the Spirit of Christ guide and powerfully influence the process and your election of someone to the office of bishop of the Church of God.

## FOREWORD

It is the intent of the sponsors of this study to assist those who are responsible for designing and guiding the diocese through an episcopal election. The book is not intended to be a "how to" manual. There are too many differences among the dioceses of our church - in membership, geography and ethos - for one design to suit all. Thus, the book does not, in any sense, remove responsibility for careful process design from diocesan leaders. But we hope it will contribute to the task.

Some dioceses have in recent years, gone through long and complex procedures of self-study, screening, nominating and electing a bishop. Others have done so with minimal preparation and within a short time frame. Some have spent a lot of money on the process, others relatively little. Some appear to believe that the Holy Spirit works best through broad-based, well-organized and disciplined corporate efforts, and others that too much "structure and process" gets in the way. Yet most groups that have led the diocese through this important phase of its life, whatever their particular design, do testify to a pronounced sense of the presence and activity of the Spirit in their group work and convention. We do not advocate a particular design. However, there are considerations that may be important to you, whatever your design, and our hope is to present those that we have learned about so that whatever applies can be taken into account.



The basic research for this report was done during 1982. We surveyed all dioceses that had had elections over the past three years, or were at that time in an election process. We then studied in depth eleven elections, using the full documentation of the entire process. In most cases we supplemented this with one or more on-site visits. The full documentation of these studies and survey results has been filed with the Office of Pastoral Development, in the Episcopal Church Center library, and in the archives at Austin, Texas. This material has been preserved in case someone else should want to study it in detail. However, it is voluminous and we do not propose it as a resource for diocesan search committees.

The study was made possible by grants from the Episcopal Church Foundation and from special contributions by bishops of the Episcopal Church. It was sponsored by the Committee on Pastoral Development of the House of Bishops, and guided by a sub-committee of that group. The sub-committee members were Bishops Edward Jones, Indianapolis (chairman); David Leighton, Maryland; and Joseph Heistand, Arizona. Bishop David Richards of the Office of Pastoral Development was probably the key person in conceptualizing the study and certainly in promoting its support and initial design. Joan Lukens (CRW Management Services) did a fabulous job of gathering the basic data, colating surveys, covering some of the field work and in organizing and reproducing material for the study.

In December, 1982, having completed the basic research, the sub-committee, David Richards, and the staff of CRW Management Services were joined by Roddey Reid (Church Deployment Office) and Adair Lummis (Hartford Seminary) for a three-day study of the material. Drawing on the basic data at hand, our own experience in bishop search consultations, the extensive experience of David Richards in consultations, and the experiences and perspectives of others in the group, the rough notes were drawn up and from these this report prepared.

The elections covered in the in-depth portion of this study were:

The Rt. Rev. James Michael Mark Dyer,  
Bishop Coadjutor of the Diocese of Bethlehem

The Rt. Rev. Charles F. Duvall,  
Bishop of the Diocese of the Central Gulf Coast

The Rt. Rev. William H. Wolfrum,  
Suffragan Bishop of the Diocese of  
Colorado

The Rt. Rev. Clarence Nicholas Coleridge, and  
The Rt. Rev. William Bradford T. Hastings,  
Suffragan Bishops of the Diocese of  
Connecticut

The Rt. Rev. C. Shannon Mallory (translated)  
Bishop of the Diocese of El Camino Real

The Rt. Rev. William L. Stevens,  
Bishop of the Diocese of Fond du Lac

The Rt. Rev. David B. Birney, IV,  
Bishop of the Diocese of Idaho

The Rt. Rev. A. Theodore Eastman,  
Bishop Coadjutor of the Diocese of  
Maryland

The Rt. Rev. C. Brinkley Morton,  
Bishop of the Diocese of San Diego

The Rt. Rev. C. FitzSimons Allison,  
Bishop of the Diocese of South Carolina

The Rt. Rev. John Forsythe Ashby,  
Bishop of the Diocese of Western Kansas

Representatives of these dioceses were extremely helpful and cooperative in the time-consuming task of organizing and copying material, documenting the process and in helping us interpret it.

We thank all those mentioned above for their encouragement and help with this project and we thank all those across this church who spent considerable time in completing surveys, gathering information and sharing their experience with us. Without their willing cooperation there would have been no study.

CRW/LW

For consider your call brother. Not many of you were wise according to worldly standards, not many were powerful, not many were of noble birth; but God chose what is weak in the world to shame the strong, God chose what is low and despised in the world, even things that are not, to bring to nothing things that are, so that no human being might boast . . . .

I Corinthians 1:26-29

## Chapter 1

### GETTING STARTED

#### Time, Tasks and Costs

It will come as no surprise that time frame and costs for an episcopal search/election process vary a great deal. In the dioceses of this study, the elapsed time from the first meeting of the search committee to the electing convention ranged from three and one-half months to sixteen months.

The shortest lapsed time and least expensive election in our study was Connecticut's. However, they were electing two suffragans, and the diocese had recently been through the election of a diocesan. Under these circumstances, they did not feel the need to get into extensive self-studies and other time-consuming processes. In general, if a diocese does intend to go through with self-studies, surveys and considering nominees from all over the country, it would be wise to allow a year. However, there are some other variables and we will pick up on them later. In general, dioceses taking less than ten months experienced time binds unless the process was a reasonably simple one.

But let's look at the tasks and see how they relate to a time frame. Every diocese doesn't tackle all these tasks, of course. But if they are going to be done, one must allow the time.

### Phase I

Appointment/charge and orientation of committee or committees

Committee organization: roles and structure, adopting/refining guidelines and criteria for committee performance.

Preparation of profiles of diocese, "world," and bishop, including, perhaps, surveys, hearings and the like

Planning and announcement of nominating and screening procedures and standards.

This part of the process should be open, visible and accessible. It could easily take three or four months. However, a couple of dioceses in our study (Western Kansas and Idaho) had on-going strategy planning processes in place and much of this work was already done. It had only to be reviewed and refined for the particular purpose of the search, a less time-consuming task. (Idaho's total process still took one year; Western Kansas took eight months. In both cases it was felt that the time frame was about right.)

### Phase II

Receiving proposals for nomination  
Screening  
Interviewing  
Nominating

This part of the process should be considered confidential. The people of the diocese need to know that it is happening and what procedures are being followed, but the substance of Phase II is handled with great discretion. Distinguish between "confidential" and "secret." Confidential means being discreet about information the committee is working with, but open about process, meeting schedules and the like. Secret means not sharing any kind of information which will prove detrimental to all. Because of travel time, delays in correspondence, and matching schedules this phase could also take three to four months.

### Phase III

Introducing candidates  
Planning, communicating election procedures  
Election  
Committee termination

Once again we are in an open, visible, accessible process, but one somewhat less time-consuming, perhaps two months or so. A couple more months might be allowed in the over-all time frame to accommodate particular seasons. For example, things move more slowly during the summer months; northern dioceses may have travel problems in the winter.

One other possible task, depending on circumstances, might be planning and carrying out the termination of the ministry of the incumbent bishop - a "celebration" of the ministry being concluded.

If the electing convention date is firmly established, the committee can begin to plan its time frame by marking that date on the extreme right end of a chalk board, then working from that date, posting dates and tasks in order, to the present. If time is tight, it is better to simply skip non-essential tasks than to jam everything up. If the election convention date is not firmly established, begin at the extreme left end of the chalk board, with the present meeting, then outline desired tasks and dates and see if where it comes out is acceptable. (A chalk board is useful since there will be lots of revisions as the planning progresses.)

After the first rough outline of the time frame, a chart can be prepared indicating how the tasks of different groups are coordinated time-wise along the way. Prepare a flow chart on paper with vertical lines representing key dates. Then draw horizontal lines for each unit involved in the process and indicate the deadline for each unit's task or tasks. In this manner the coordination of many tasks can be indicated on one simple planning chart. The Diocese of Western Kansas used a form of planning diagram called PERT charting (Program Evaluation Review Technique). See Appendix A.

The following is a check list for working up your budget.

- Search committee (meetings)
- Interviewing prospective candidates  
(travel)
- Consultant fees/expenses
- Nominee expenses
- Secretarial services
- Office costs
- Printing/PR
- Electing convention
- Travel/moving expense - bishop-elect
- Service of ordination

We said earlier that episcopal election costs vary a great deal. In the dioceses of this study the costs ran from a low of \$4,300 to a high of \$41,000. (1981 and '82 dollars, remember.) The amount spent bears no apparent relationship to the size or relative wealth of the diocese. It is clearly related to the complexity and length of the process. On the average, dioceses spent about \$3,000 a month. One diocesan said, "Be sure to tell them that it's expensive; I had no idea it would cost that much." Several people advocated taking out key-man life insurance on the bishop-elect for a few years "just in case you have to go through it again too soon."

### Committee Formation

A group is needed to guide the diocese through the process. Sometimes this is covered by the Standing Committee, sometimes by an elected committee, sometimes by an appointed committee or committees. Dioceses have reported satisfactory results using all of these approaches. Still, there is evidence that some advantage is gained in appointing a committee or several committees.

In those places where the Standing Committee directly took on the task, the process tended to be simple, short term, relatively inexpensive, and focused mainly on canonical requirements. In places where the Standing Committee appointed other groups and delegated most of the tasks, or where a special, broadly representative group ran the process, there appeared to be higher levels of interest and a greater sense of accomplishment.

Where the nominating committee is elected (by deaneries, for example, or by convention) there is some suspicion that this tends to politicize the process early on. At the outset people have reason to view the process as a contest. "Who will win the power to plan and influence the outcome?"

In most of the places studied the committee was appointed. In one diocese the Standing Committee appointed several committees for particular tasks; in another the bishop called on deaneries for nominations (one in each order). Then from those proposed, appointed one representative from each deanery, adding to their number others as needed to make the committee representative of the whole diocese and to meet other criteria he

had in mind. The bishop, in consultation with the Standing Committee, might appoint, or the bishop might appoint and seek endorsement of the Standing Committee. In any case, appointment appears to be the best way to assemble a committee if that group is expected to meet previously established criteria. Criteria usually identified include:

- \* attention to ethnic, cultural, age, sex, orders and geographic representation;
- \* people with a track record, able to function as team members, work well with groups and understand divergent views;
- \* people with a large view of the church ("We are electing a bishop in God's church - not just a diocesan leader.");
- \* people with considerable credibility in the diocese;
- \* people with time to devote to the job.

The person chosen to chair the committee has a crucial role. Because of this the chair should not be elected by the committee, but appointed in advance. In some cases co-chairs were appointed - a lay and a cleric. Appointment provides opportunity to select someone who will meet important criteria. These include:

- \* executive ability - ability to take charge;
- \* vision of the church beyond the diocese;
- \* neutrality - not a "party" person
- \* time to give to the job;
- \* perhaps one who already understands the vacancy search process.

If a diocese is already politicized, with clearly recognizable interest groups, it is probably not best to overtly represent interest groups by the strongest spokespeople, as this is likely to unnecessarily politicize the process. Interest groups do need representation, of course, but by people who meet the aforementioned criteria - credibility across the diocese, for example.

Of the dioceses studied, none of the appointed committees reported resistance to the appointment procedure, and none reported feeling handicapped by the fact that they had been appointed. Appointment, when fairly



done, appears to be an acceptable and practical way of securing a committee that is motivated and competent to do the job.

Once appointed, it is generally understood that the committee's task is to design and guide a healthy diocesan-wide process, not to be advocates of particular candidates. A standard usually adopted requires that if a committee member agrees to nomination, he or she is dropped from the committee.

Top quality secretarial and office back-up service is important to the committee and must be taken into account, either in appointments or back-up services or both - and included in the budget.

What is the diocesan's relationship to committee work once the committee is launched? In the case of electing a suffragan, the diocesan should describe the job he has in mind, perhaps prepare a position description. In preparing for the election of a coadjutor or diocesan, the incumbent could help by sharing information concerning his use of time (his position description if he has one), and perhaps his vision of where the diocese is going. However, this is very sensitive territory and care must be exercised to avoid feelings that the incumbent is trying to influence the process. Generally, it appears, that once the committee is formed, the incumbent backs off and lets the process go. One bishop commented, "I appointed a committee that I had unqualified confidence in, and a chairman I thoroughly trusted, then got out of the process altogether. And I experienced no anxieties over how things went."

The spiritual formation and nurture of the group is clearly very important and, perhaps to some (in the cases studied), surprisingly effective. It should be intended, planned and carried out with discipline. Some advocate a chaplain for the committee. One committee rotated responsibility for preparations for study and worship at each meeting. Meetings typically were opened with a prepared worship service and closed with prayer. The agenda of many groups included frequent periods of group study: of scripture, parts of the service of ordination of a bishop, and other appropriate material (THE APOSTLE IN OUR MIDST from Forward Movement Publications, for example). During especially long and/or heavy sessions (screening proposed nominees, for example) there would be frequent breaks for prayer. Many witnessed to a profound experience of the guidance of the Spirit through such procedures. Some in our research group felt that it would be appropriate for the Presiding Bishop to

note the launching of a search process by alerting all dioceses. He could, it was suggested, request the prayers of the whole church for the process leading to an election of a bishop for the whole Church.

The best experiences of dioceses studied suggests an overnight initial meeting of the committee. The group might, as appropriate, hear its charge from the diocesan or from the Standing Committee, study a written form of it, meet and be given the opportunity of using an outside consultant. They could begin their spiritual journey through training and experience, study a time frame and begin to organize their tasks. Committee members could also be urged to come to terms with the importance of forming trust relationships among themselves for the effective dispatch of delegated responsibility in the future and for winning the confidence of the diocese. This team building process at the outset has been found to be most valuable. (This will not necessarily be the committee's only overnight meeting.)

#### Delegating the Work

So far we have been discussing the formation of the "search" committee. It may also be called the "nominating" committee. Unless the context suggests otherwise, we will hereafter use either committee name without implying a distinction. Whatever the local useage, the task is basically the same - to help the diocese through a healthy, Spirit-guided process of searching, nominating and electing its episcopal leadership. The search committee may organize itself for the delegation of particular jobs to sub-committees, or it may assign specific tasks to other groups it appoints or to other existing diocesan groups. In any case, when we say "search committee" or "nominating committee" take that to mean whatever the local committee is called, and as appropriate to include related groups as well.

Some of the tasks that could be, and often are delegated to others include:

- \* preparing a profile of the diocese and the world in which the diocese serves;
- \* preparing a profile of the position they expect to fill and the experience, skill and qualities they are looking for in a new bishop
- \* planning a procedure for receiving proposals for nominations;

- \* planning and carrying out a celebration - final service and party - for the retiring bishop, if that's appropriate, of course;
- \* planning the compensation range and perquisites of the office and be prepared to communicate the same to nominees and negotiate specifics with the bishop-elect;
- \* planning the electing convention;
- \* planning the service of ordination.

A group may also be appointed to "wait on" the bishop-elect and family (be available to help with any personal needs during the move, getting acquainted and settled.) Perhaps another group or individual could take care of public relations within the diocesan family and with public media.

With all of these there may be budget considerations and time-coordinating considerations. The search committee normally covers the coordination, but a budget committee might be needed to work with the various groups, determine costs and look for sources of funding. Special sources are often drawn upon, or special contributions sought.

Delegating appropriate responsibilities spreads the workload over many shoulders and it can increase the sense of involvement in a broad-based, corporate and interdependent effort. In a healthy diocese the process has often had a good renewal effect. It promotes the unity and sense of direction of the diocese, and the new bishop comes into an exciting and positively challenging new job. If the diocese is seriously fragmented or polarized, careful committee formation and process design are even more important, and even then the process may not work toward unity. In this case the new bishop comes into an extremely difficult situation and while it may be said that the job is "challenging," the challenges are not the exciting, positive kind that we would hope for.

Some of the suggested "assigned tasks" mentioned above deserve a little more attention.

- \* Preparing profiles of diocese, world and bishop: See chapter 2.
- \* Planning a procedure for receiving proposals for nomination: See Chapter 3.

## Planning and Carrying Out Closure for a Retiring Incumbent

If the diocesan has announced a retirement date that precedes the election or falls soon after, it is important to see that this event receives the attention it deserves, and is not lost in all the pre-election activity. The issue here for the on-going life of the diocese and the retiree is to have a positive, clean termination of the relationship in order that both retiring bishop and diocesan family are free to establish new relationships - new "contracts." It is sometimes seen as being a "death and resurrection" occasion and resurrection doesn't occur until death is truly experienced. An occasion or occasions should be planned - a time to worship, a time to joke and remember, a time to cry. It should take place as near as possible to the actual time of retirement - no lingering after events to raise questions about whether termination has indeed occurred. All this doesn't mean that the retiring bishop now ceases to be a member of the family. However, it should be clear that the old "contract" is past and both parties are now free to enter into a new and different relationship, as may be desirable and appropriate for each.

## Planning the Compensation Package

It is surprising how many people have been nominated for bishop without having been informed about what the diocese was willing and able to do regarding salary, housing, sabbatical, moving expenses, and the like. One new bishop expressed how grateful he was to have been given a month's vacation right after the election to give him time to catch his breath and ponder what was happening to him. But often these matters are not dealt with until after the election. Then there is a mad scramble to cover unanticipated issues. It may be discovered that this bishop-elect has different housing needs than the previous one. In any case the family has to know where they stand income-wise to get on with their family financial planning.

This task, properly done, involves more than simply setting the salary level. Remember to include such items as budgeted discretionary fund, entertainment fund, various expenses in support of the job, such as a travel expense account. There are additional considerations such as continuing education expense and leave time to pursue it; sabbatical and annual vacation.

Remember also in setting the salary level, the diocese is not only providing a living - it is also saying something about how it honors the position of chief pastor. See "A Conceptual Model of a Position" in the booklet PRINCIPLES AND PRACTICES IN PERFORMANCE EVALUATION. (THE PERFORMANCE EVALUATION KIT: note reference on page 45.)

### Planning the Electing Convention

Here again is a discreet task that might be best assigned to one group. The help of the chancellor will be needed to assure that all is in canonical order, including special rules for the electing convention. There is considerable detail to cover, even if date and place have already been determined. There are canonical requirements for notices to delegates, a design for worship, preparation of a proposed way of proceeding with formal nominations, standards regarding "nominating speeches," contingency plans for dealing with many ballots, accommodation for media representatives and so on. While the search committee will probably notify candidates of election results, this too is an item requiring sensitive handling and, therefore, pre-planning.

### Planning the Ordination Service

This is another task involving a great amount of detail that can conveniently be assigned to a separate group. Even the assigned group may choose to delegate particular jobs to others: the liturgical commission to plan the service; someone to provide transportation and hospitality for guests; dealing with the media; notices, invitations, and related social events. One diocese retained a group process consultant to help with the planning and oversight of the celebration. In another place committee members reflecting on their planning for the service said, "We thought of everything except security for the offering . . . . It filled four grocery bags." The group responsible for planning the ordination service might find the National Liturgical Commission a helpful resource.

### A Temporary Support Group for the Bishop-Elect

One diocesan appointed a committee of four to "wait on" the bishop coadjutor-elect. Another appointed a diocesan staff member. In still another case the three people from the search committee who had visited the bishop-elect during the search filled this role. In

every case where this function was formally covered, the bishop-elect expressed appreciation for the fact that he knew exactly who to contact for information or help on any matter and for the fact that the service was provided efficiently and with care. Furthermore, it left him with no feeling of having imposed on anyone.

It should be understood, of course, that once the new bishop is settled, such a group backs off and ceases to have any privileged relationship with him.

### Public Relations Services

During the search process it is, obviously, very important to keep people informed of progress. A search committee frequently assigns this particular task to one of its members. Then the diocese, and especially the convention delegates, need information about the proposed nominees. Finally, the whole process becomes very public during the electing convention, the arrival of the bishop-elect and during the service of ordination. Sensitive handling of the media, press releases, setting up interviews all deserve professional attention. It can help assure a desired balance between confidential activity and the openness needed to insure the electorate's confidence in the process. One bishop in particular expressed gratitude concerning how well the diocesan press officer handled his job - getting accurate and adequate news releases out and avoiding sensationalist angles.

### Budget Work

This is the task often assigned to the finance committee. It is not one that is normally overlooked, but costs are frequently underestimated. It is well to get into it early - and realistically - monitoring progress carefully, and it may be necessary or desirable to seek special sources of funding.

### Committee Termination

Sometimes it is overlooked that the committee's work will one day be completed. Before that time they will have gone through some pretty intensive experiences. They will have known, probably, fierce disagreement, the heavy weight of responsibility, the presence and prodding

of the Spirit, pain, love and joy, and deepening relationships of mutual appreciation. Members of one committee expressed feelings of emptiness when their work was finished and their team life fizzled out unceremoniously. Members of another group "had a bash" and expressed satisfaction and appreciation for the fact that they had designed a concluding party into the process to celebrate and mark the end of their work in that particular incarnation. Closure for the committee members appears to be important; an event of some kind should probably be scheduled and designed in from the beginning.

### Outside Help

In a research study of healthy clergy - congregational relationships sponsored by the Clergy - Congregation Committee of the Council for the Development of Ministry - Flower Ross, researcher - bishops reported that vacancy consultations were among the most important factors in healthy relationships. It was mentioned by every diocese contacted. They talked about how the diocese helped assure that congregations use the service and about the profiles that were expected out of the process.

"THE CLARIFICATION OF EXPECTATIONS THAT ARE EXPECTED TO RESULT FROM VACANCY CONSULTATIONS WAS CLEARLY THE MOST IMPORTANT SINGLE HOPE THAT THE BISHOPS I INTERVIEWED HELD OUT FOR HEALTHY CLERGY / CONGREGATIONAL RELATIONSHIPS."

-from the Ross report (emphasis hers)

We feel that from our studies we can make the same claim for the value of diocesan "vacancy consultations."

All the dioceses we reviewed where outside consultant help was used, expressed a high level of satisfaction with the services received. The two most frequent kinds of help used were:

(a) The overall process consultant. He was sometimes called into the diocese to meet with diocesan representatives before the committee was appointed. He might then return to meet with the committee in their first overnight meeting to help with the agenda discussed earlier for this meeting. The consultant may meet with the committee on scheduled occasions thereafter for coaching and design refinements, but does not get involved in the proposing of candidates, screening or evaluation of proposed nominees.

(b) A trainer to prepare the teams who will be going into the field to interview proposed nominees. This is an important, demanding and sensitive process and people should not be expected to do it without adequate preparation. Candidates have been evaluated almost exclusively on the basis of their response to a questionnaire used during the interview. This is not an adequate use of the occasion.

One diocese, as mentioned before, used an outside resource person to design the "celebration of a new ministry."

It is our hope that this manual will offer some of the help that might come from an outside process consultant. However, we suggest it as a supplement, not as a substitute for competent outside help. Contact the Office of Pastoral Development for assistance or suggestions regarding qualified services.



"There is one great difference between people chosen to be God's messengers and earthly messengers. While those on errands of this world almost always know that they are sent and where and why, people chosen to be messengers of the Most High rarely even know that they are His messengers. Unsuspecting and unaware. Consumed by their own plans and itineraries. Busy at work on their own schemes. God is already sending them somewhere else.

"I do not know how many times in one's life one is also a messenger. But for everyone it is at least once. One to whom it is given to know that their errand is completed is blessed and rare. Not so for most of us.

"Remember only that you are not always going where you are going for the reasons you think you are."

-HONEY FROM THE ROCK  
Lawrence Kushner

"XV. Elect therefore for yourselves bishops and deacons worthy of the Lord, men that are gentle and not covetous, true men and approved; for they also minister to you the ministry of the prophets and teachers. Therefore despise them not; for these are they that are honored of you with the prophets and teachers. . . ."

THE DIDACHE  
(an ancient manuscript,  
ca. 2nd century)

## Chapter 2

### AN INFORMATION BASE

Most dioceses, early in the search process, engage in some kind of self-study out of which statements are prepared and inform the continuing process. If a diocese has a long-range planning process going and it has already produced such documents, they may have a head start on this task. However, the question must still be raised, whether these documents bear the authority of the whole diocese. Or were they produced by a small planning group, without common diocesan knowledge or contribution? If the latter be the case, they still need to be tested by the constituency.

The documents typically cover these areas:

- \* A profile of the "world" served by the diocese. This is a description of the geographical, social, economic, ecumenical and other conditions of the territory.
- \* A profile of the diocese, which is a state of the church report.
- \* A description of the next bishop and the job as they understand it. This may take two forms: a draft position description (the bishop's job in that diocese) and a profile of the person they are looking for in terms of needed skills, experience and qualities.

The first two of these are often combined into one document, which is all right as long as the writers recognize of the need for both kinds of information.

There are several purposes to be served by such papers and the studies which produce them.

a) To inform the people of the diocese and to pull them together around a reasonably common understanding of who they are, what their world is like, what challenges are before them, and what kind of job their new bishop will be expected to fill. Thus, there is a need for a process that will invite contributions from many and dialogue among contributors. Well managed, this process can enhance self-awareness and add to the unity of the jurisdiction.

b) To inform the search screening process and to inform potential candidates. Because of this useage, these reports should be factual and accurate descriptions. They are not "chamber of commerce" PR pieces designed to sell someone on all the good aspects of the diocese. The positive and the negative should receive fair airing.

c) To inform the new bishop and serve as a guide, at least initially, to the diocese and to what is expected. Of course, in the case of a position description, no one individual will precisely fit all the criteria. So the instrument may also stand as a basis for reviewing the situation in, perhaps, a year. This could be an occasion for offering feedback to the new incumbent on how others view his performance and for refining the job expectations to better suit the leadership strengths of the bishop.

The Profile of the "World". This statement could include geography and climate, history as it contributes to current myths and traditions, major population centers, industry, population mix, social and political issues and hot spots, economy, education and ecumenical mix and climate. It should not be a lengthy report, but concise; the kind of report that could be reproduced in

the diocesan newspaper. What is needed is a brief statement that will create an accurate impression of what this part of the nation is like and imply something of the challenges before a church trying to hear the call of the Lord to ministry in that place. There may be a temptation to produce too much material. It should be remembered that more detail on particular points of interest can always be gathered. What is needed in this report is a brief statement that will be read and that will convey an accurate impression of the situation without intimidating the reader with too much material or with technical jargon.

Profile of the Church. This paper could include such obvious data as number of congregations, membership, attendance and income (trends could be plotted on simple graphs), number of clergy (priests, deacons, seminarians, paid positions, volunteers, etc.). It should make note of non-parochial diocesan institutions. (One bishop was called and later discovered that the diocese had a massive complex of institutions that demanded a large percentage of his time. No mention had been made of this in the position description or documentation of the diocese.) The report should not avoid such things as inter-diocesan politics, if that is important - factions, movements, traditions and the like. Again, the report should be brief, but honest and straightforward.

Position Description and Profile. The position description should be understood as a draft. (Draft, because a working position description should be negotiated between the organization and the incumbent.) Many of these papers dwell far too much on personality characteristics and/or lists of duties. Personality traits are difficult to specify or quantify and, in some cases perhaps, unfair. (St. Paul would have lost in such a screening.) In any case, that which is important in this area will be sensed in personal interviews.

Lists of duties are not helpful. If appropriate results are achieved, it will probably make little difference to the diocese what duties were performed personally, delegated, or precisely what approach was taken. A better way is to identify "areas of accountability" such as:

"to guard the faith, unity and discipline of the whole church;"

"to proclaim the Word of God."

These are broad and general, but one then goes on to specify those "accountabilities" in terms of conditions that are expected through "standards of performance." (See Appendix E for an example, or see THE PERFORMANCE

EVALUATION KIT for instructions - see reference on page 45.) With this kind of position description the incumbent is free to organize, delegate and inspire others in ways appropriate to the incumbent's strengths, special talents and preferences.

The position description should be specific, not in its totality applicable to any other episcopal position. It is a position description for the bishop of this diocese in this decade.

In addition to the position description most groups also prepare a profile of the person sought: skills, education, experience, work orientation, etc. Your diocesan Church Deployment Office liaison will be a helpful resource in this task. A review of C.D.O. materials will enable the committee to cover these matters in a way that will be useful when it comes time to do the actual search.

It is surprising how many position descriptions and/or profiles are prepared by a committee that did not consult with the current bishop concerning how he uses his time, where the binds and priorities are, or about emerging new issues that the next bishop will be faced with in the next couple of years. Nor is there evidence, in many cases, that they consulted with anyone else who knows the episcopal job from personal experience. We are not suggesting that a committee should accept everything other bishops have to say, but it might help to listen. If the incumbent has a current position description, take a look at it. If the diocese is using a program planning and budgeting system, that plan might indicate how the bishop is now using his energy in relation to the particular program areas and general administration. All this could contribute to the committee's task of specifying the job for this diocese in this decade in realistic and useful ways.

It has been suggested that the position description should make it clear that the bishop is expected to devote time to rest and relaxation; to family; and to prayer, study and reflection. While this is not usually thought of as part of the description of the job, the pressures of the office are often considerable. To make it understood "up front" that the diocese respects and expects this commitment of time for its own long-term benefit may help the bishop in managing the kind of balance in life that it implies.

Most dioceses make use of the Church Deployment Office in their search process. They may use it for

scanning the files and generating a list of potential candidates, and they nearly always use it to gather information in the form of clergy profiles for use in their study and screening procedures. The position description and profile are the documents from which the search instrument is prepared. In the process of doing research for this study, the directors of the C.D.O. submitted these observations on episcopal elections involving their services.

1. "In general the emphasis is still on looking for a person with certain desirable qualities rather than on finding someone to do a well defined job peculiar to the situation at hand and who has the aforementioned qualities.

2. "Accordingly the job descriptions tend toward the ethereal, the spiritual, and the pious rather than the actual and the concrete.

3. "When the concrete is mentioned, then every task under the sun is often listed, as though the bishop should himself be an expert in everything. There seems to be no distinction between what the bishop must do himself and what he can properly delegate to others.

4. "The job descriptions seem often to have been drawn up with no input from anyone who knows the job from the inside (another bishop or committee of bishops).

"In light of the above we hope that the bishops of the church will take a stronger lead in the guidance of the dioceses as they choose their chief pastors."

Data Gathering and Processing. One commonly used method of gathering data about opinions of the membership is the survey. It is also a frequently misused method. Since it is predictable that someone will suggest the use of a survey, it seems appropriate that we tag a few points concerning them.

They are not particularly necessary and they are probably not the best initial step in a search process. Written surveys have been taken in a couple of ways: distribute and retrieve them during some event (the Sunday morning service, a diocesan convention) or mail them out and ask for a mailed return. Sometimes an individual response is sought; sometimes a group response. Surveys have also been conducted by telephone or personal interviews.

We suggest that if a survey is to be conducted it is better to do it on some specified occasion. One diocese had a "Survey Sunday." Materials had been circulated to congregations in advance, leaders instructed and the people notified. Then, on "Survey Sunday" everyone who was in church had a chance to respond in writing on the spot.

A survey conducted in this manner is likely to elicit more thoughtful and responsible information. The purpose of the survey can be more sensitively presented, and it is likely to contribute to the formation of diocesan consensus. (People know it is a diocesan-wide event; they are likely to share concerns and opinions afterward, etc.)

Written responses to mailed questionnaires may not result in thoughtful responses nor elicit a very high sense of accountability on the part of the respondent. Nor are they likely to contribute as much to the formation of a diocesan consensus.

In any case, where it is decided to make use of a written survey, we strongly recommend the following:

The designers of the survey should be very clear about what information is needed, for what purpose, and how the information will be processed and used.

Expert technical assistance in survey design and collating is essential. Many surveys we have reviewed are rampant with leading or loaded questions. Respondents feel boxed in, manipulated. Some questions are so general that when a respondent provides written opinions, the resultant mass of material is almost impossible to process.

It should be clear to respondents (by the form of the instrument and by accompanying material) that they are not casting a vote, merely submitting an opinion or supplying information. A survey is part of an information gathering process in planning. It is not a vote in some broad-based democratic process. If this is not clear, respondents may feel betrayed in the future when they discover that things have moved in some direction other than that which the weight of opinion has suggested. And it may be the case that this will happen.

The results of the survey should be reported. When people take the time to fill out a survey form and then hear no more about it, the credibility of the process is brought into question. The report need not be extensive, but highlighting findings, indicating ways in which the information is being used and the fact that it has been helpful are important points to report back to the constituency.

Survey results are no substitute for planning, merely one step in the process. They are no substitute for leadership, merely a way to inform leaders. Thus, one does not simply report a tabulation of responses, but studies and interprets findings. Do not, for example, send the CDO a colated tabulation of survey results. The search committee is not merely a conduit for popular opinion; it is responsible for processing the information.

A profile of the "world" report can best be prepared by a small group of people who understand the perspective of the church and who know that part of the world in which the diocese serves. Church members, for example, in fields of journalism, law or education might be good candidates. A survey of church members might contribute to the substance of such a profile if it is desired to include data, for example, on what church members see as priority social concerns.

A profile of the diocese could best be prepared by people who have ready access to statistics and who know the diocese. A survey of members could produce supplemental information on opinions of the diocese concerning in-house issues. If, for example, there is a heavy bias in the diocese against the ordination of women or the use of non-salaried clergy, this is important information for an episcopal candidate for what it reveals of the diocesan climate. However, it need not imply that candidates who do not share those opinions are screened out.

Many dioceses have surveyed the membership to discover what kind of bishop the people want, or what they will expect of their next bishop. The results of this kind of survey should be seen as part of the profile of the diocese. It should not be seen as a substitute for a position description or even very important as a contributing factor in the preparation of the position description. Few people understand the demands of the episcopal office. They want to know their bishop as



friend and pastor. They may want to take pride in his public image. Their expectations are important data for an incoming bishop, thus part of his education concerning the state of the church. They might even be important as a way of demonstrating to the people that the bishop can't possibly do everything they expect or be all things to everyone. But the task of preparing a realistic position description remains - a technical task to perform quite apart from the results of such surveys.

In our experience with episcopal search consultations - experience borne out in this research - a valuable method of informing the search committee and of helping the diocese form its self-understanding is the group dialogue session. This might take the form of regional gatherings of people who, together, ponder and critique prepared statements set before them. One small diocese called a meeting of clergy, wardens and convention delegates. In an advance mailing they had received documents prepared under the authority of the planning committee and a position description prepared by the Commission on Ministry. In a one-day session they broke into small groups to study the material and report. Planning committee and DCOM members were on hand to share in the dialogue and to take notes on the critique offered. It was a thoroughly open and healthy process. Out of this the documents were revised and the resultant papers were, in the opinion of the planning committee and COM, considerably improved. Even more important, now they were owned by the broad-based leadership of the diocese.

Another practice that has proven valuable in a number of dioceses is the clergy conference. During any election process clergy will engage in informal discussions about what they would like to see in a new bishop, and this conference provides a formal setting and occasion for this dialogue. It has the effect of legitimizing the discussion and getting it out in the open. Typically, the design includes placing clergy in groupings that transcend natural cliques, with an agenda to guide discussion and retrieve opinion to inform the search committee. Clergy appear to value this opportunity - the openness - and to gain confidence in the overall process.

Here again, in any group process design (as in the use of surveys) technical expertise is required. Use someone skilled in group process to keep proceedings open and data out on the table. In one pre-election group session there were those who felt that the process masked real conflict in the diocese. While apparent

consensus was reached, people went home and actually subverted what was supposedly agreed upon.

If a survey has been used, a well-supervised group session is a good place for reporting findings - for getting the issues and divergent opinions out in the open and dealt with.

The task at hand is not only that of gathering information. It is also one of creating mutual understandings of life in this diocese and some level of consensus about where the diocese should be going.

Surveys are no substitute for this kind of group effort. They may contribute appropriately along the way, but the larger task is formative (forming and unifying the diocese around shared self-understandings), and informative (helping the committee with its search responsibility and providing insight about the diocese for prospective candidates).

Gathering Proposals for Nomination. Most search committees try to keep this step in the process low key until the above tasks are completed and proposals can be made in response to findings. It is a very rational step by step process: come to terms with who we are, take note of the challenges before us, take stock of our strengths and capabilities, define our leadership needs; then start looking for the person we will call to be our bishop. However, people aren't merely rational animals; there is plenty of energy, emotion and impatience around transcending the rational process. So names will indeed be suggested before the job has been defined.

Usually names that are offered "prematurely" will simply be received quietly and held until the time is right. However, there then comes the time when the committee can say, "OK, now we are ready to consider proposals for nomination," and some procedures need to be announced. It is not uncommon for a committee to receive something in the neighborhood of 100 names. We suggest, therefore, that the committee not adopt the standard that proposed nominees must have been contacted in advance to determine interest. That is simply too many people to alert and later disappoint. Better to just receive the names and do the initial screening quietly. The committee might well ask those proposing names to prepare a thoughtful statement on why they think their person would be a good nominee for this particular diocese in these times. This will have the effect of reducing the number of half-serious proposals and the information will contribute to the committee's pool of information on the individual proposed as they begin their screening .

The committee does need to say from whom it will receive proposals and by what firm deadline. A firm deadline is important in order that the committee can proceed with its own work on schedule. "From whom" might be "clergy and lay delegates" or any member of the diocesan family. Remembering that the diocese is electing a bishop of the whole church who may eventually serve in other dioceses, and who will be a member of the House of Bishops, a select list of people outside the diocese is often canvassed as well. Profiles and position descriptions are sent with an invitation to propose a name for nomination. Those on the list may include the Presiding Bishop, bishops of neighboring dioceses, of all dioceses in the province, or even all the bishops in the church. It might also include others such as seminaries.

The Church Deployment Office (815 Second Avenue, New York, NY 10017, telephone 212-867-8400) should always be considered as a source of possible nominees. Records are maintained on over 9,000 clergy and a search of these records based on diocesan criteria will help assure the diocese that no good candidates have been overlooked. The directors of the C.D.O. are always glad to consult with dioceses on how best to use the office.

Our general impression is that a long list of proposed nominees is desirable, even though it considerably increases the task of study and screening. A long list broadens the scope of the search and appears to improve the odds that highly qualified people will be considered.

The committee should avoid listing illegal criteria, such as age, marital status, sex or race in their instructions.

With the names in and the deadline reached, the first phase of the search process is complete. Again, this phase should be - and be perceived as - open, straightforward, fair and accessible. As mentioned earlier, some dioceses have chosen to skip one or all of the above steps in the interest of time, expense or with the conviction that the Holy Spirit works best through less structure and process; spontaneity is desirable. Some dioceses have relied solely on the nominating committee to nominate and some have simply set a date for the convention and received nominations from the floor. But for those who choose a more elaborate process, we have tried to offer useful considerations and suggestions.

We have included several sample papers in the appendix. They should not be seen as models to be replicated, but as examples that might be useful to those doing similar papers.

The first four are from the process that resulted in the election of David Birney, Bishop of Idaho, in 1982. In general, the people who received these materials and considered the possibility of a call agreed that they presented an accurate, fair picture of the diocese and what would be expected of them.

Appendix B - Where We Live is a profile of southern Idaho, that part of the state known in the Episcopal Church as the Diocese of Idaho.

Appendix C - Who We Are is a profile of the Episcopal Church in Idaho.

Appendix D - Profile of a Bishop: the results of a survey of members. It should be seen as part of the profile of the church (membership opinion).

Appendix E - Towards a Position Description of the Bishop of the Diocese of Idaho: The position description lists areas of accountability, associated tasks and standards of performance. It also includes a pledge of support of the bishop who assumes this position.

The next paper is from the process that resulted in the election of Ted Eastman, Bishop Coadjutor of the Diocese of Maryland. It combines profiles of the "world" with state of the church information and is organized around regions.

Appendix F - A Profile of the Diocese of Maryland

Appendix G - Survey Form and Results, Central Gulf Coast: Note that it is informative regarding the opinions of church members, but it does not directly result in "a position description for our next bishop."

Appendix H - Form for proposing nominees. This form is adapted from one used by the Diocese of San Diego.

The Lord said to Samuel, "Fill your horn with oil and get on over to Jesse's house, for I have selected a king from among his sons."

So, in fear and trembling, Samuel came into Bethlehem and explained his errand. Jesse, not too sure what this was all about, nevertheless decided to cooperate and paraded his sons, one by one before Samuel. Eliab was first - tall, strapping, good-looking man and Samuel figured this was the one. But the Lord said to Samuel, "I don't see the same things you see; I see the heart."

Next came Abinadab. Then Shammah and others - seven in all, and all passed over. Finally, Jesse had to send for David, the youngest, who was out in the field. David arrived, was chosen and Samuel took the horn of oil and anointed him right there in the midst of his brothers, and the Spirit of the Lord came mightily upon David.

Then Samuel left for Ramah, leaving Jesse there to pick up the pieces. A nice turn of events - for David - but how was Jesse to explain all this to the other seven?

I Samuel 16:1-13 (more or less)

## Chapter 3

### SCREENING, INTERVIEWING, AND NOMINATING

We now begin Phase II, a part of the process that must be handled with a special degree of confidentiality and sensitivity. If the committee has won the trust of the diocese it should be able to proceed. Others understand the need for discretion through this phase also.

The committee now has a list of prospects parading before them, as it were. If it is a long list, probably only a few know that their names have been submitted. Of these there may be some who do not feel that their future involves being a bishop; others who might not wish to consider it yet, or not in this diocese. Most would probably be flattered to know that they were being considered. Many (probably) should not be called to this office because of a "poor fit" in this particular diocese, or because they are better suited for another kind of position. Perhaps others are simply not "bishop caliber." Among those in the long list there are a few, we suppose, who are well qualified to grow into the position of bishop of this diocese in this decade, and be a valued addition to the episcopate. How to identify those few and how to do it without overly disrupting the lives of all in the process - that's the task now.

### First Screening

The committee has quite a bit of information available to it as it starts. The information supplied by the one who proposed the name, the clergy directory, the CDO profile (which by now should have been applied for and received). There may be personal knowledge of some prospective nominees by members of the committee, and there is the prospect of discreet personal inquiries. All in all, it is not necessary now or, in our opinion desirable, to contact everyone on the long list of names before the readily available information can be studied. One diocese contacted some 150 prospects before beginning their screening process. That would seem to be an unnecessary number of lives to disrupt.

It also increases the committee's workload immensely. Not only are there piles of in-coming material to process, but the committee is thereafter morally obligated to remain in touch with each person with whom it has initiated contact until that individual is informed that he or she is no longer under consideration. This can be a substantial material processing and pastoral workload for the committee. Deferring contact with potential nominees until after the first screening also means that those who are contacted have a shorter period of time to "sweat out" the committee's continuing deliberations. It is a kindness to all to do the first rough screening quietly.

On the basis of the above mentioned information, one can learn something of the individual's experience, track record, ministry style, strengths, and approaches, and compare it with the position description and criteria they have adopted. In this first screening the committee generally looks for evidence of job stability, years of experience in the priesthood, liturgical emphasis, evidence of a personal spiritual life, ability to organize, delegate and challenge; and ministry strengths or concerns that suggest compatibility with the diocese. This task of prayerful study and review of data is sometimes done in a retreat setting during an overnight session. It takes time. No name is tossed aside lightly. The committee may divide into small groups, with each group given a portion of the list to study, followed by joint sessions where findings are reviewed and action taken by consensus. Frequent time out for prayer and study is not uncommon in this process: calling on the guidance of the Spirit and being recalled to the long term significance of their task. In this manner the list can normally be reduced to a manageable number for more thorough investigation - perhaps 25 or so names. In preparation

for the task, the committee will need the training and coaching of the diocese's trained CDO liaison person to learn how to use that office's clergy profile printouts.

### Second Screening

Usually the objective at this point is to select some 12-15 (or whatever the committee feels it can handle) people for further consideration, including personal visits. This is the committee's first contact with candidates. (If the committee has decided to initiate contact with proposed nominees prior to the first screening, what follows hereafter applies at that point in the process.) The committee usually begins with a mailing to the subject, enclosing the profiles that have been prepared (for the subject's information), a questionnaire and a personally addressed covering letter. The letter explains that the individual has been proposed for nomination and invites the subject to say whether he or she wishes to be considered further. If "yes," the proposed nominee is invited to supply additional information and usually to respond to a questionnaire.

The whole approach, beginning with this mailing and running through the entire process to the election should be one in which the candidate is invited to cooperate with the committee in order that together they might discover the will of God in the matter. It should avoid the implication that the subject is being asked to enter a contest, to compete for the position, or even to apply for the job. The questionnaire should, under no circumstances, invite the subject to say why he or she "wants to be the next bishop of our diocese," or why they think they are qualified for the job. All such blatantly competitive type questions should be eliminated. Ask for straightforward information such as one can supply honestly and modestly, with the feeling that one is assisting the committee in its task, not applying for the job or trying to prove something.

This first contact should include assurances that the committee intends to be honorable in its on-going treatment of the subject, supplying appropriate information at stated mileposts in the process - cooperating with the subject as cooperation is sought from the subject. Remember that for those who feel called to proceed with the process, the committee is making a big intervention into their lives and the lives of their families.

The first contact should also point out that if the subject is to proceed faithfully in the process and



be dealt with responsibly by the committee, their (potential) candidacy will have to be shared with the leadership of their congregation and/or diocese. If dates have been set for candidate visits to the diocese, these too should be noted to avoid possible calendar conflicts in the future.

Questionnaires usually ask for responses to data sent by the committee: profiles, opinions on contemporary issues, and notes on their spiritual journey or discipline. They may include a request for a glossy photo. One diocese asked for responses by cassette tapes. Care should be taken not to ask for information that is already at hand from standard sources; that's insulting. One should keep the burden of preparing responses reasonable. Don't include every question that every committee member thinks up. Ask a few very carefully formulated questions. If it is important to get such information from 20 or 25 people, it is only fair to test the questionnaire in advance. Ask a few non-involved people to respond to it. See what they do with it and ask them how they felt as they worked through it. Then revise the instrument accordingly. (Were some questions unclear? Unfocused? Demeaning? Too personal? etc.)

Some dioceses have found it possible to gather all the information needed without using any questionnaire. If one was used in relation to a first screening process, certainly a second questionnaire is not called for. That is too much to expect of prospective nominees and makes it very difficult to avoid the impression that candidates are expected to compete for the job.

Bishop Richards, Office of Pastoral Development, has consulted with many dioceses in the search process. He strongly recommends that no questionnaire be used, pointing out that all necessary information can be gathered from standard sources, third party interviews and especially the team visit. "Better to avoid the questionnaire and expand the number of persons interviewed."

Most dioceses do, however, seek some kind of personal written response from candidates. If it is to be done, we urge extreme care in the preparation of materials and sensitivity to the extra burden this places on the subject.

See Appendix I for a simple questionnaire used by Western Kansas and for an instrument they used for analysis and rating of responses. Note that the response reveals a great deal more than the substantive response to the questions.

In addition to the response to this initial contact, committee members may contact the subject by phone, check his listed references, and others to learn as much as they can. Usually the job is divided among teams of three or four. Their job is to get to know their assigned person as well as they can, not just the accumulation of objective information, but actually moving toward a sense of knowing the individual personally.

The usual practice then is for the committee to further reduce the list of possible nominees to twelve or fifteen or whatever number they believe they can afford (time and budget-wise) to personally visit.

Sometimes (at this point or in the first screening) a comparison grid instrument or some other rating instrument is used. These can be useful, but it must be remembered that such rating devices are aids to processing information; they are no substitute for decision making. When all the comparative grading has been done, the committee can still question why they rated one this way and another that way. The instrument can provide for deeper probing and consideration, but the mathematical results should not be considered the last word. People make decisions; instruments do not. This should be explained in advance; otherwise someone might get "hooked" on the instrument and feel that the process has been betrayed when further reflection leads to decisions that run contrary to the initial results of some mathematical scheme for rating.

Again, many committee members have reported that it is a deep, Spirit-filled process. The job may be handled in an overnight retreat setting. It involves the committee in privileged information and confidentiality must be maintained. It should be remembered throughout that CDO print-outs, resumes, and third party evaluations are confidential - for the committee's use only - and all copies should be destroyed when the committee is finished with them. It is not easy for the committee members to keep the process confidential; they are surrounded by concerned and curious people, and the temptation to share information is high.

### Visiting Prospective Nominees

Not every diocese sends interviewers into the field for personal visits to prospective nominees. It is expensive and time-consuming. Yet most do feel it worthwhile or even necessary. Teams of perhaps three

people line up their visitations, make a swing, contacting two to four of the candidates, then compare their findings. If it is going to be done, there are some considerations.

First, prospective nominees need to know in advance that this is part of the design, and approximately when it will occur. Second, remember that it is an occasion for the subject to interview representatives of the diocese as well; allow time for that. Third, the point of a field visitation is to see the subject on his own turf, so plan to be present for some event (the Sunday service, for example), where the interaction of the subject with the people who know him best can be observed. Also, plan to have conversations with other local people.

There are also some cautions for the visiting team. It is a temptation to move into the field with feelings of "power." The visiting team is not "choosing a bishop;" it is gathering information for the committee. Team members need to check their own attitudes regularly, reminding themselves of a point made earlier: the individual they visit is not "applying or competing for the job." Do not approach him or her in a manner that would tend to put the subject into this kind of awkward bind. The proposed nominee is cooperating with the committee in the belief that the will of God will come through in an honorably managed process. It is a matter of common courtesy to keep with agreed schedules and procedures. Interview those people that the subject has lined up for the occasion, not those one meets incidentally in a social setting, such as the coffee hour. Be quietly sensitive to those interviewed; it may not be an easy time for them. In one situation the priest had lined up a small group to be interviewed by the team. The members of the group had serious doubts about this priest's qualifications and they wanted to share these with the team. During the interview team members did so much talking that the group members never found an opening to make their doubts known, and the team returned home with glowing reports of that prospect.

Since the visiting team must later compare notes with other teams, it is important that the format and design for the visits be planned. Then reasonably comparable kinds of information are at hand for a review on that occasion. Because of this and because of the sensitivity of the whole visiting process, it is imperative that adequate time be allowed for training the teams and planning the interviews.

Team training seems to be a recognized need today. It usually is covered in some manner. Still, the evidence at hand suggests that there is more to be learned about this important element in the process. Our contacts who had provided for training all affirmed its value, but some indicated it should have gone further. Several places used Myers-Briggs typology testing. This is a readily available means of analyzing one's preferred approach to life's situations. "Preferences" are registered on four continuums, each of which has an extreme position on one of two poles. There are no "right or wrong," nor "good or bad" scores. It is simply a way of typing one's usual approach to things. Furthermore, it is typically experienced as affirming and fun, as well as informative. Testing team members serves several purposes. First, a "team" ought to include members with different ways of seeing things in order that the team as a whole have the ability to perceive more in the interview and in evaluating their findings. Thus, results are used in assembling the teams so that different types are included on each team. Secondly, people of widely divergent typology often have difficulty understanding one another. Knowing the "type" of other team members contributes to communication ability and mutual understanding. Finally, knowing something of these various approaches, or types, will help the team members understand the subject interviewed. In any case, the point here is that some arrangement for team training is desirable. Design it in time-wise; make sure it is not seen as "optional," and get professional help in providing for it.

Planning the interviews might be done in the same setting as training the team. The training session could then include simulated interviews where team members test their skill and sensitivity, as well as the planned substance of the interview. In addition, the "interviewee" can share reflections on how the process felt. Again, the point in planning the interviews is for the sake of being able to realistically compare findings later. However, there are a couple of other matters to consider.

In most cases the interviews will probably supplement findings gathered by other means. If a questionnaire was used, one should therefore distinguish between the purpose of the questionnaire and the purpose of the interview. To repeat questions in the interview that the subject has already responded to is insulting to the subject and implies that the team has not done its homework in studying the material already gathered.

"It should be noted that there are two ways of believing. One way is to believe about God, as I do when I believe that what is said of God is true; just as I do when I believe what is said about the Turk, the devil or hell. This faith is knowledge or observation rather than faith. The other way is to believe in God, as I do when I not only believe that what is said about Him is true, but put my trust in Him, surrender myself to Him, and make bold to deal with Him, believing without doubt that He will be to me and do to me just as what is said of Him."

- Martin Luther  
quoted in CONTEXT

Perhaps this suggests the distinction of purpose between a questionnaire and the interview. Responses to a questionnaire and data from other sources can offer information about the subject - information about the subject's opinions, theological slants, pastoral approach; information about the subject's ability to express himself in writing and so on. The interview is more personal. The task is to come to know the individual, rather than simply to know about. It is to come to believe in the subject as a person, a human being. One might even say, to surrender, to be vulnerable to, the interviewee and to remember once more that the challenge for all is to be open to the proddings of the Spirit.

The visitors also have a chance to observe the subject's level of energy, rapport with others with whom he shares leadership, and apparent care about what he is doing. One area requiring special sensitivity is dealing with the subject's wife or husband. Visitors generally recognize the old adage that they are not hiring the spouse. On the other hand, the state of the marriage is no small matter. The diocese has no right to expect the spouse to be a free extra hand, but it might need some assurance that the spouse is not going to be a hindrance in the episcopal ministry. One wife of a bishop-elect expressed surprise at how little attention she received during the visit. "I could have been an individual with serious personality disorders and they would never have seen it. It seems to me this is something a diocese would want to know about."

Generally, the kinds of questions one might use in the interview, in contrast with those in a mailed questionnaire, should probably be less focused, open, and freeing, inviting the subject to come across in a relaxed and intimate way. "Tell us about your ministry in this place."

Responses to such questions are not as easy to compare later on, as responses to a checklist of specific queries with multiple choice answers. However, if all the visiting teams are operating in similar ways with a common understanding of what they are after, comparisons can be made.

This raises another issue for the committee. If members have, prior to field visits, developed a high level of mutual respect and trust, they will be able to confidently listen to one another's reports of field trip experiences. If not, there will be little to go on in the final screening. Team reports in this case might come across as prejudiced or as reports of advocates, rather than sincere attempts to share and compare findings.

#### Choosing the Nominees

This, then, brings the committee to the point of selecting the few they will place in nomination at the convention. In those places sponsoring extensive pre-nomination preparations where the committee had, by now, formed a community dedicated to its servant tasks, there are many impressive reports of a profound sense of the presence of God as the group brings its task to fruition. It is, for them, an awesome, holy experience.

Their task, in what we have called "Phase II" has been, as noted in the opening of this chapter, to identify those few who could be the next bishop of this diocese. It has been suggested that if the job has been accomplished at this point, it makes little difference whether the diocese proceeds to an election or simply casts lots to determine their new episcopal leadership. Perhaps this is a good test for the committee. If they feel this way about the list they offer, they will also, most likely, feel that they have done their job well.

Note the following appendices:

Appendix J - Letter to finalists after second screening (Idaho)

Appendix K - Letter notifying the subject of his/her elimination from further consideration (Bethlehem)

In Idaho the candidates all visited the diocese at the same time. It was an opportunity for the people of Idaho to meet the candidates and a chance for the candidates to check out this intermountain jurisdiction - the land and the people.

At one point they were brought to the diocesan office. One of them, presumably would soon be setting up shop here. They were introduced to the executive secretary, the bookkeeper, shown various rooms. Then their escort pointed rather incidently - "Oh, that's the bishop's office."

The door was open, but no one was in a position to actually see inside. There was no lack of curiosity, but some tension ... an awkward moment. No one wanted to appear too eager. Finally one did hazzard a peek. He busted out laughing and went on in. The others followed and joined in the laughter. The tension was broken and everyone relaxed.

On the bishop's chair sat a life-sized ceramic chimpanzee, a banana in his outstretched hand. A sign on the front of the desk read, "This place is going bananas without a bishop."

## Chapter 4

### INTRODUCING CANDIDATES AND WELCOMING THE NEW BISHOP

This is the part of the process we have referred to as "Phase III." The committee will do well to remind itself that it is back into the business of managing an open, visible process.

As part of our research we did a survey of convention delegates - people who are highly regarded in their dioceses, but who were not involved in the search process except as convention delegates. We asked them to tell us what was most helpful to them in arriving at a decision on how to vote. What were the most important sources of information about the nominees?

84% of the respondents held up the formal, printed candidate introduction piece prepared by the search committee as an important resource.

73% claimed that the candidates' visit to the diocese was important to them.

35% said that their own personally initiated contacts (over their own "grapevine") helped.

8% reported high levels of confidence in the committee and 8% said guidance of the Holy Spirit. One respondent said that "In the end, one's vote is based on instinct, some information and FAITH."

Respondents typically listed more than one source of information, so these figures total more than 100%.



The results of the survey deserve a little more interpretation than that provided by a simple tabulation.

First, all dioceses studied made use of some form of formal, printed report for announcement of the candidates who would be nominated by the search committee. These reports usually included a photo of the candidate, family and career information and sometimes a direct quotation dealing with one or more issues. It is probable that for some delegates this was their only source of information prior to the convention itself. It is not, therefore, surprising that the document was important to many of our respondents. It also suggests that great care should go into making it a fair and useful source of information.

We believe that the 8% who claimed confidence in the committee as an important factor is not significant. Other evidence convinces us that there was generally a high level of trust and confidence in the committee's efforts, but a high level of trust does not by itself provide information on particular candidates. It does, on the other hand, give electors reason to have confidence in the report that the committee circulates. In other words, we believe a high degree of confidence in the committee was generally experienced and is very important, but one still needs information on the candidates.

We likewise feel that the low 8% reporting "guidance of the Holy Spirit" as important is misleading in the tabulation. Our questionnaire sought opinions regarding value of information provided in advance of the convention. These respondents appear to be considering the dynamic of the convention itself. We believe that a much higher percentage would have affirmed the presence of the Spirit in their proceedings, had our questionnaire been designed differently.

The one-third who rated their own personal research high is significant. Probably for those pointing to this source of information, it was a very important source. However, everyone doesn't have access to an inter-diocesan information network, and it may be that some delegates would even regard this as improper detective work - possibly an end run on the process. (We are not advocating or judging here, just trying to interpret.)

Finally, there is the 73% who affirm the value of the visits. Of the dioceses studied, two out of eleven

did not invite candidates in for a visit with the electorate. Thus, of our respondents, some 18% couldn't have mentioned the visit as important. Furthermore, several respondents who claimed importance of both the printed report and the visit went on to explain that the report was a good preliminary source, but that the visit was the deciding factor for them. Considering this survey along with other evidence gathered during this study, we believe that the visit is the single most important way for the people to come to a feeling of actually knowing the candidates for whom they vote.

All of which does pose a dilemma. The candidate visit is one of the most controversial elements in the total process. On the one hand, it is clearly the most helpful way of informing diocesan personnel. One bishop, during the election of a coadjutor observed, "I wouldn't have believed that people could become so personally in touch with each other during such a brief visit." He offered several examples to document his point. On the other hand, it is potentially awkward for all involved. This uneasiness is revealed in poking fun at the process: "a dog and pony show" which helps no one.

We talked with many who had been through this experience and we conducted another survey of people who had come through an election but were not elected. In this survey, the visit was only one aspect of the process that people commented on, but here again there is a wide diversity of opinion. Some found it demeaning; some thoroughly enjoyed it - meeting the people as well as the other candidates. In some cases the differences may have had to do with the design of the procedure. In others it probably had to do with the personality or character of the candidate.

We are inclined to agree with one candidate who did enjoy the experience and observed (reminiscent of Harry Truman's off-hand comment about heat in the kitchen), "Well, bishops do have to be up front under trying circumstances sometimes and if you can't handle it, you shouldn't be a bishop." (Another candidate complained that he had had no prior first-hand experience of the diocese. That is probably so in many cases, but the diocese can hardly be expected to bear the cost of visits by potential candidates. One might assume, under the circumstances, that the candidate can do a little research on his own or use his personal network.

All of this does not, of course, diminish the importance of careful planning for the visit. Of the dioceses studied, the visit occurred after the screening

was done. Thus, the purpose was not related to the screening process. It was to offer the electorate the opportunity to get to know the candidate in a more personal way and under relatively relaxed conditions. The visit is also an opportunity for the candidate to get to know the diocese - its people, structure, general climate, the culture, environment, perhaps ecumenical conditions. In one rector search process we were involved in the candidate under consideration arrived a day early. He spent the day visiting other local clergy and sniffing out the overall religious situation before the formal meetings that had been lined up. The point here is that the candidate doesn't have to be entirely passive. Anything that can be interpreted as campaigning will certainly be resented, but to inform oneself in preparation for a decision that one may have to make is a different matter.

If the visitation is to be part of the process, we offer the following observations, mainly from those who have experienced the process.

Most dioceses have scheduled two, three or more events, perhaps by deanery, to reduce travel on the part of a widely dispersed electorate. If this is in the design, allow enough time for candidates to catch their breath along the way. A whirlwind tour is not generally appreciated.

There is a need for balance between formality and informality. A reasonable amount of structure or formality conveys a sense of dignity about the proceedings. On the other hand, a reasonable degree of informality (time for one-on-one conversations when the candidates are not up front) is also appreciated.

Again, we emphasize the overriding consideration: in all that is done convey the impression that "these people are here to assist us in discovering the will of God concerning a new bishop for our diocese. They are cooperating with us." Any hint that candidates are on hand trying to prove themselves or campaigning for the position is justifiably resented - and this is precisely what is resented most by candidates . . . that somehow they are supposed to try to win a contest. If the correct posture can be maintained, it will help candidates relax and come through to the people in a natural and relatively comfortable manner.

Exercise some care in naming the event...something that reflects mutual respect and dignity. Then use that name. Discourage the use of demeaning references,

such as "show and tell," "beauty contest," "dog and pony show." It is very easy for candidates to feel like they and their spouses are on display; joking about the event by nicknaming it is no help.

The usual procedure is to bring all candidates into the diocese at one time for one or more sessions, as convenient. One diocese, for example, had three sessions on three days, spotted conveniently around the diocese. The candidates were taken to the rectory of a host parish for dinner. They then went to the church for a brief service of worship with convention delegates from that region. The delegates were divided into small groups, meeting in separate rooms. Candidates then visited the small groups one by one. The small group meetings were relaxed and informal. The sessions were closed with a coffee hour and social mix, then final prayers.

Time is also provided in some designs for a meeting with the Standing Committee or others, and, of course, time should be provided for meetings with the diocesan. In one diocese electing a coadjutor, the diocesan used this time to declare his intention about retirement in the presence of all the candidates at once, in order to settle rumors that had circulated. It is also a time to discuss expectations concerning working relationships - how episcopal duties will be shared, if that is appropriate.

As the visit draws to a close, a setting should be provided for the candidates to reflect on the experience: a debriefing session. It has been an intensive experience and some kind of debriefing or closure appears to be appreciated.

### The Election

Local canons and custom will dictate the formal design of convention. Usually candidates from outside the diocese are not asked to be present. Following a worship service, the committee makes its report, formally nominating its candidates. Then nominations are accepted from the floor. Generally, nominating speeches are kept brief. Every effort is made to offer the proceedings to the Lord and discourage an atmosphere of campaigning.

It is obviously important to be personally and pastorally in touch with the candidates immediately after the election. The diocesan might be inclined to handle this by phone, or members of the team who had visited the

candidate might assume responsibility. Even though the phone call has been made, a formal written notice is also called for.

### The Transition

There is a transition of sorts, even for those not elected. One nominee reported that following his nomination, he got to work in the parish, laying plans for all the new things that he would do, or things he would do differently after he learned of his defeat in the election. This was his way of programming himself - getting himself excited about the alternatives - for a more easily managed post-election letdown. It sounds like a good idea, but we don't know whether it works....He didn't lose the election!

In our survey of nominees who were not elected (25 responses received) we asked about feelings experienced upon learning of the results, and whether the candidate would consider nomination again. One of the surprises in the survey was the friendly, cooperative feel of the reflections offered. Several expressed gratitude for the chance to respond. In studying this material we got the distinct impression that there was unfinished business here. These people - some at least - needed an opportunity to share their feelings and finally close that chapter in their lives. We are not sure what this suggests by way of process design. Certainly candidates deserve a formal letter notifying them of results, and thanking them for their cooperation. (Two of our respondents said they never received formal notice of election results.) Beyond this, it might be helpful, say two or three months after the election, to ask nominees to evaluate the process they have experienced. However, this should be done by someone engaged in an on-going study of search processes, such as one who regularly consults with search committees. The diocese has little real use for the information once their election is over, and it's insulting to ask someone for information that is not going to be used.

But to get back to the substance of these responses....Many respondents expressed feelings of relief after the election. "Some disappointment" was felt by many. There was some bitterness reflected in a couple of responses, but more typically people were philosophical about results. They still felt strong in their faith and OK about their own careers. They expressed confidence in the work of the Spirit, acceptance of the situation, and they were glad to have it over with.

We have included a sample of other responses in Appendix L. In reading them, keep in mind that the respondents are not all referring to the same election. We hope this material will give you a feel for where the experience of not being elected has left these people. Whatever your design or procedure for post-election follow through, you will leave some number of people out there taking up their tasks once more, putting their lives back together after learning of election results. Your care - or lack thereof - in dealing with them throughout the process will be a significant factor contributing to their state of mind at this time.

For the bishop-elect the transition is quite a different matter. Remember that the first thing that has to happen after election results have been communicated is in the hands of the one elected. The diocese has now issued a call; there is no bishop-elect until the one receiving it makes a decision. It may be resented if the committee simply assumes that the answer will be "yes." There is an interesting dynamic here and one sometimes overlooked by committee members. Let's look at it from the subject's point of view.

Here is an individual who has been asked to cooperate with the committee and the diocese in trying to discern the will of the Lord. He has probably gone through a great deal, not only of cooperating with the diocese, but of personal soul-searching, prayer, and perhaps counsel with others. Always there has been a hypothetical question: "Will you accept a call to be bishop?" Hypothetical questions cannot be answered except hypothetically. There is no call in the implied question. (We reiterate a point made earlier: do not put this question before a candidate. Do not ask one, "Will you accept if elected?" It's like saying, "Will you marry me if I should decide to ask you?") However, now the diocese has elected and the question is, for the first time, a real question. Now, for the first time, the subject must deal with the real question. Now, for the first time, a decision really must be made. Respect that reality.

We discussed this dynamic with a group of newly elected bishops. It had been very real in their own experience. They agreed that, having come all that way in the process, it is not likely that the answer will be "no." Still, one must respect the need for the individual finally to ponder the call, hold it before God and make a decision. We pressed the bishops for some idea of what would be a reasonable length of time. It is not likely that this will be an issue. The answer will

probably be there within a few hours. At the outside, they agreed, the diocese should expect an answer within four days. Beyond that, the candidate is not being considerate.

With an affirmative answer we enter into a whole new phase. For the bishop-elect, announcements back home and a job to terminate, and perhaps all kinds of family arrangements to cope with - a home to find, a move to plan and implement, cooperation with the diocese in planning the ordination service and getting acquainted with the people, the job and the organization.

For the diocese, the canonical requirements for consent, a major service to plan and schedule. In Chapter 1 we covered several of these transitional matters under the sub-headings:

- \* Planning the Compensation Package
- \* Planning the Ordination Service
- \* A Temporary Support Group
- \* Public Relations Services
- \* Committee Termination

You may want to review these again at some appropriate point.

We stated early in this volume, the purpose of the sponsors of this study and the book: to be of assistance to those who bear the incredible responsibility of guiding their diocese through an episcopal search - election process. It has, of course, been our purpose also. We have, in addition, intended to produce a piece that would be readable and interesting, as well as practically informative - not too long, not too technical, and one that would inform without implying that there is only one way to do the job.

We have enjoyed this project immensely. Many of the dioceses and people who helped in this research have been our friends and clients in other work. It has indeed been a work of love and care. Episcopal elections have been changing dramatically these past several years. There is still much to be learned in using the new resources at one's disposal: the Church Deployment Office, search consultants, team training. But we hope those who must take on the job now will find this volume helpful.

Godspeed.

## The Authors . . .

Chuck and Lynne Wilson (CRW Management Services) have served the church for many years as consultants, trainers, researchers and writers.

Chuck has had some ten years experience in parochial, diocesan and national church staff positions. For the past 13 years he has been in private practice. Specialties: planning, organization, evaluation and personnel practices.

Lynne has served in the dioceses of Alaska and Olympia, and on the faculty of Cook Christian Training School, Tempe, Arizona. Her specialties are graphic design, training and curriculum design.

The couple recently published **AGAINST ALL ODDS**, a book based on research of small church effectiveness and sponsored by the Standing Commission on the Church in Small Communities.