

### **Notes from June 19, 2022 Q&A with Canon Anne-Marie Jeffery**

The Good Shepherd congregation met in the church with Canon Anne-Marie Jeffrey to discuss the transition process from about noon to 12:50. 20-25 people were estimated to be present. Besides Anna Gilcher and Rosemary (Senior and Junior Wardens), the other Vestry members included Vanvisa, Florence, Debbie, and Ray Battistelli. Finance Committee members included Vanvisa and Melissa. Kathryn videotaped the meeting on her phone.

Anne-Marie began the meeting by sharing the seven steps of the current Diocesan transition process. She said that there will be different people from the Diocese to accompany us through each step of the process. One of the steps falls under her purview. She is not the main overall transition person as The Rev. Dr. Robert Phillips will be on sabbatical for about two more weeks. The seven steps are as follows:

1. Put clergy in place for the interim period. GS has already done that. Virginia and Anna Olson will alternate services through July. Beginning August 1, Anna Olson will become our halftime interim rector. She will continue her  $\frac{1}{4}$  assignment with Buen Pastor. The real work on the transition will begin in September.
2. The Transition Officer, Rev. Dr. Robert Phillips, will come to meet with the Vestry.
3. Financial review – Focus on “What can we afford?” An audit will be done. This is an important piece since there are churches where, after the rector is in place, it is “discovered” that there is not actually enough money to fulfill financial obligations. This new process attempts to avoid such surprises. A discussion took place about compensation for the Rector (also see below under Q & A). There were comments concerning misunderstandings which arose in the last year at Good Shepherd.
4. Parish vitality assessment – Where are we now? What needs help? Anne-Marie is in charge of this step. There was a conversation about how such an assessment would take place. Anne-Marie said that she likes focus groups as a method of gaining information. We would discuss different areas of parish life. What can we do?
5. Review of the Good Shepherd website. It was pointed out that this is usually the first place that any potential candidate will go to learn about the parish.
6. The Office of Transitional Ministry profile (OTM profile) will be generated. We will be guided in responding to 11 questions and those responses will constitute our “profile”. Our OTM profile will be compared with candidate profiles to find a match. A fit? Not a fit?
7. The Vestry will comprise the search committee for the new Rector and there will be no profile committee. The next step is a team (vestry?) meeting. What’s next? What are we looking for?

The pace of this whole process is basically up to each parish. Three to six months is typical but some parishes take 2-3 years.

NOTE: The Tending Our Soil 360 survey will feed into the assessment (step 4). There are candidates who react positively when they learn that a parish is doing Tending Our Soil.

This next section deals with more Q&A as well as specific comments from those present.

- Shaun asked what the diocesan philosophy of a “raise” is? What is the difference between a cost of living increase (COLA) and a 'raise' or 'merit increase' which in many workplaces does not come automatically if at all.
- Anne-Marie acknowledged that a raise is difficult for lots of parishes.
- It is important for the priest and the parish to have the money conversation although not always easy for a priest to broach the subject. The Diocese does not have any explicit guidance.
- At what point do we begin to have the money conversation?
- Such a conversation begins with a financial review of the parish (step 3) which is accompanied by writing a job description.
- It is recommended that the parish establish a personnel committee.
- Yearly reviews of the priest are recommended: How are we doing? What are your goals? It is not the place to air difficulties.
- The importance of a job description and specific goals was emphasized. This is not the same as a Mutual Ministry Review.
- What can be done for this period of time? It should be tied to what is reasonable at the negotiated pay level.
- There are generational differences in understanding the scope of work. Example: The younger generation might work hard, but, at the same time, expect personal time for self, family, etc.
- What kind of employer would we at Good Shepherd want to be?
- Greg (speaking from experience) shared that a teacher’s job is not graced with limited time expectations or a job description that encompasses everything that a teacher actually does. Greg’s point was that the job of a parish priest and the job of a teacher had some commonalities in the sense that service to others can be full of surprises.
- Lynn and Liz asked specific questions about having a priest working less than full time – 75% or 50%, etc. An interesting discussion ensued. Anna Olson spoke about New York state where less-than-full time parish priests are more prevalent than one might think. The Diocese of New York is developing “norms” for part-time clergy. This brings up some questions:
- If a priest is, for example, ½ time with a parish, how is that person using the other ½ time? As ½ time at another parish? To raise a family? To \_\_\_\_\_?
- ½ time at two parishes can have real issues. For example, does each parish get the priest, i.e., communion service, only every other week?

- ½ time, either in combination with another parish or whatever, would require a very specific job description to fit that model. It can be easy when a priest is less than full time for the parish to have expectations that gradually increase and may result in part-time pay for more than a part-time job.
- All this conversation about ½ time, ¾ time, etc. led to Anne-Marie's focusing those in attendance back to the reality of the times in which we live. The whole church (not sure if the reference here was just to the Episcopal church or was broader than that) is in transition. The clergy-centered model of the past isn't working.
- The numbers of clergy, especially clergy looking for parish work, are definitely down. Anne-Marie gave the example of a parish like All Saints Chevy Chase that might have had 70 job applicants in the past might now have had no more than 11. Our parish is in an expensive area.
- Florence asked how best the two pieces – finances and job expectations – can work together.
- This led to a conversation about finances. As affirmed by Anne-Marie, the “total stipend” for the Rector is a package consisting of cash salary and benefits. Benefits include a housing allowance (tax-free), health insurance, pension (calculated as 18% of salary plus housing plus SECA), and SECA (calculated as 7.65% of salary plus housing), etc. There are Diocese ‘guidelines’ for the cash salary based on the number of years of experience and the operating budget of the parish but with no other specifications. EDOW provides no guidelines for the housing allowance. The finance committee affirmed at the meeting that Good Shepherd staff have received EDOW suggested COLAs every year except 2018 .
- Debbie stated that based on a Vestry 101 course she has taken online, it is important to have a treasurer on the Vestry.
- Shaun stated that the Good Shepherd by-laws state that the Vestry appoints a Treasurer but no-one has accepted this responsibility in quite a few years. (Note: the by-laws state the following: *“ The Vestry shall annually appoint a treasurer. The Treasurer is charged with the orderly collection and disbursement of parish funds under the direction of the Vestry and shall make a report at each regular monthly meeting of the Vestry of all financial transactions and of the financial state of the parish.”*)
- The financial business of the parish is currently divided between a paid part time accountant from outside the parish (YPTC “Your Part Time Comptroller”) and the Good Shepherd Finance Committee that is composed of volunteer parishioners. The Finance Committee can only make recommendations to the Vestry in an advisory capacity. Anne-Marie asked how the Finance Committee communicates with the Vestry. There is one Vestry member on the finance committee: Vanvisa. The goal has been for the finance committee to report quarterly to the Vestry.
- One thing that Ann-Marie said during the Q & A was that anyone can attend a vestry or finance committee meeting (usually by Zoom). Is there access to minutes?

Conclusion:

- There had been previous questions about transparency and the importance of involving all parishioners.
- Anne-Marie compared the time of transition to the act of swinging on a trapeze – having to let go of one rung in order to grasp the next. We are evolving. The process will be creative and interesting but also challenging. We WILL make it work.