

**Ottawa Presbytery - Exit Interviews for Departing Order of Ministry Personnel -
By the Pastoral Relations Committee - Review of Nov. 2012 Policy (November 2013)**

Overview:

When Order of Ministry Personnel are leaving the pastoral charge, for whatever reason, conducting a formal exit interview by the Pastoral Relations Committee provides an opportunity to explore the time spent in the position and their reasons for departure. The resulting knowledge is intended to improve pastoral wellbeing and support to the lives of Ministry Personnel, pastoral charges and their families.

References to the Conduct of Interviews:

The Manual (2013) – Related Resource – Presbytery Committees (August 2013) outlines the general duties of the Pastoral Relations Committee, including:

- (e) making appropriate recommendations to the presbytery when the beginning or ending of a pastoral relationship has been initiated; and*
- (f) determining the suitability of applicants seeking designation as interim ministers, supporting the process for beginning an interim ministry in a pastoral charge, and evaluating a period of interim ministry after it ends.*

The Handbook for Joint Needs Assessment Committees has been replaced with **The Manual – Related Resource – Pastoral Relations: Engaging and Supporting (October 2013)**. Although the former document included a reference to consulting the incumbent, the latter does not make a reference to this practice.

The **Handbook for Ministry and Personnel (M&P) Committee Guidelines** (revised January 2010) states;

9. The Annual Review - Exit Interviews

Exit interviews, held when ministry personnel and staff leave their positions in a pastoral charge, are becoming common in the United Church.

Note: this document is in the process of revision.

The **Interim Ministry Policy and Procedures Handbook** (revised April 2012) states;

D. At the End of an interim Ministry

1. General Responsibilities

Presbytery is responsible for

- . conducting a review/evaluation of the interim ministry and present state of the congregation*

Note: this document is in the process of revision

Background:

In the past, the Pastoral Relations Committee had been inconsistent in carrying out exit interviews with departing Ministry Personnel, but in November 2012, the committee agreed to a formal policy for exit interviews with a review after one year. In November 2013 the committee concluded that the exit interview process was helpful but recommended (1) that the executive summary of each interview be retained until new ministry personnel is in place; and (2) that the policy be reviewed again in one year (November 2014).

Guiding Principle:

The Pastoral Relations Committee believes that all departing Ministry Personnel should be interviewed at the time of their departure and or retirement. The Pastoral Relations Committee will conduct an exit interview for all Order of Ministry Personnel (Ordained, Diaconal, and Designated Lay Ministers) at their departure and/or retirement. Local Ministry and Personnel Committees will continue to conduct their own exit interviews with departing Order of Ministry Personnel, plus Congregational Designated Ministry staff and Lay Worship Leaders.

Initiation of an Exit Interview:

Upon receipt of a notice of a pending transition being received, the Chair of Pastoral Relations will initiate action to ensure that an exit interview is carried out. Pastoral vacancies are both a demanding and opportune time, it would seem, to capture an understanding and perspective of the departing personnel regarding their time of service and the circumstances of their leaving. In the case of retiring clergy, it also provides an opportunity to clarify how they propose to separate themselves from the congregation in order to maintain a professional relationship with incoming new Ministry Personnel as outlined in the Church's Ethical Standards.

Timing of an Exit Interview:

The Ministry Personnel should be contacted by the Chair of Pastoral Relations or designate as soon as possible after public announcement is made of their planned departure or retirement to set up an interview. Information related to the nature of the questions that will be asked should be provided to the individual in advance of the interview and it should be made clear that the interview will be treated as confidential. Having said this, it will also be made clear to the interviewee how the information will be vetted, shared and stored. In some situations the spouse or partner of the departing Ministry Personnel may wish to attend the exit interview, or may wish to be interviewed separately or may wish to provide written input to the process. Such involvement or input is welcome.

Process:

a- The Chair of Pastoral Relations or designate will contact the departing Ministry Personnel to inform them of the exit interview process and ensure they are provided a copy of the exit interview policy and procedure (including questions and areas to be addressed). The chair will also identify the two Pastoral Relations members that will be contacting them to establish a meeting time and place.

b- One of the two Pastoral Relations members will contact the departing Ministry Personnel to establish a date and location for the meeting.

c- At the time of the exit interview the Pastoral Relations members will ensure the departing Ministry Personnel have a copy of the questions and will take notes during the interview in order that they can prepare an executive overview of the interview. If a written response to the questions is provided by the departing Ministry Personnel, it will be appended, with the approval/consent of the interviewee, to the background interview notes.

d- The final executive summary, flagged as Confidential, will be provided to the departing Ministry Personnel for review and amendment to ensure their comments and observations were correctly reflected in the document. Corrections and additions will be made to a final version and a sign-off by the departing Ministry Personnel will be requested. The Interviewee will be reminded that the final signed executive summary will be shared with the Conference Personnel Minister and retained by the Chair of Pastoral Relations.

e- Departing Ministry Personnel will also be reminded of and encouraged to request an exit interview with their local Ministry and Personnel Committee.

f- The final signed executive summary will be reviewed by the Chair of Pastoral Relations and will, for confidentiality reasons, be maintained appropriately in their records, not within the Regional Office records. The Chair of Pastoral Relations will share the final, signed executive summary with the Conference Personnel Minister for information. The final executive summary will be returned to the Chair of Pastoral Relations for retention. At such time as a new Joint Needs Assessment Committee (JNAC) is initiated for staffing within the congregation, the Chair of Pastoral Relations may share the final executive summary with the 2 members of Pastoral Relations assigned to the JNAC to ensure the background information related to the departure is shared such that the resulting final JNAC report addresses issues identified by the previous Minister. The Exit Interview executive summaries will be transferred at such time as a new Chair of Pastoral is appointed.

Process within the Interview:

The departing Ministry Personnel should be informed that the final executive summary resulting from the interview will be shared with the Conference Personnel Minister and retained with the Chair of Pastoral Relation as “Confidential” and that it will be made available only to those members of Pastoral Relations who are assigned to JNAC committees established as a result of their departure, unless otherwise authorized by the departing Ministry Personnel. All other notes and interview material will be destroyed appropriately after sign-off of the final version of the executive summary. The final signed executive summary will be retained until the new ministry personnel is in place.

Policy Review:

It is recommended that with the use and experience gained through the conduct of exit interviews, this policy should be reviewed again in one year (November 2014).

Resources:

See sample questions in Appendix A

Note: This policy and supporting sample questions can be made available as a tool to assist local Ministry and Personnel Committees conduct exit interviews for departing order of Ministry Personnel including, Congregational Designated Ministry staff, and Lay Worship Leaders.

Appendix A – Sample Questions for Ministry Personnel Exit Interview

1. Why are you leaving?
2. Describe your time/experience at _____ pastoral charge?
3. What do you believe were the highlights of your time with this pastoral charge?
4. What do you believe were the greatest difficulties during your time with this pastoral charge?
5. What were the most important achievements you made?
6. What important goals were you unable to achieve and why?
7. What, if any, regrets do you have, as you depart this pastoral charge?
8. What was your experience with Presbytery during your time in this pastoral charge?
9. What excites you about the future of the pastoral charge?
10. What worries you about the future of this pastoral charge?
11. What do you think are the pastoral charge’s expectations of their new ministry personnel?
12. How did your family experience this pastoral charge?
13. What lessons/experiences from this pastoral charge will you take into your next ministry?
14. What would you want to tell the incoming Ministry Personnel about this pastoral charge to assist them in making their time a positive experience?
15. How can Ottawa Presbytery best support this pastoral charge?
16. How can Pastoral Relations best support the new Ministry Personnel?
17. What can we learn from you about this pastoral charge or Ottawa Presbytery to increase our effectiveness?
18. For retiring Ministry personnel: How do you propose to separate yourself from the congregation in order to maintain a professional relationship with incoming new Ministry personnel as outlined in the Church’s Ethical Standards?
19. Is there any additional information you would like to have recorded as part of this exit interview?

Interview Location

Interview Date

Name of Departing Ministry Personnel

Name of Member of Pastoral Relations Exit Team