

REPORT OF THE TRANSFER AND SETTLEMENT REVIEW TASK GROUP

Origin: Permanent Committee on Ministry and Employment Policies and Services

Summary

The 38th General Council 2003 passed the petition “to closely examine the current Transfer and Settlement process to see if it is indeed a policy that serves the current needs of the church; and that if this examination determines that the Transfer and Settlement process no longer effectively serves the need of The United Church of Canada, that the General Council act immediately to develop a new policy that will effectively serve the needs of the whole church.” (2003-08-GC38-185, ROP 2003 p.104 & p. 636). The working group of PC MEPS to accomplish this was established in 2005 and did preliminary work with the hope reporting to the 39th General Council 2006. It became clear that this was too ambitious, therefore, the group was reconstituted as a Task Group of PC MEPS through the Nominations Committee.

The Task Group studied several previous reports concerning transfer and settlement and consulted with stake holders, including Chairs of Settlement Committees, Presbytery Pastoral Relations Committees, pastoral charges that had requested settlement within the period 2002 to 2007, individuals who had requested transfer and/or settlement during that same period of time, Theological Schools and websites of other denominations.

The major observations of the Task Group were:

1. The majority accepts, is satisfied with, and is well served by transfer and settlement.
2. There is significant minority that does not accept the system nor is it well served by it.
3. There is lack of consistency in choice in that pastoral charges may choose to go to settlement but Candidates for ordination and commissioning cannot.
4. There are varied needs for both pastoral charges and individuals that require different approaches.
5. The hope in *The Manual* to provide all ministry personnel with a pastoral charge and all pastoral charges with a minister is not being accomplished now, yet there is concern that if we let go of the policy of compulsion, that situation will become worse. Most of the other denominations we researched have systems of assisting Candidates to establish a first call that are more flexible than a policy of compulsory settlement.
7. There is need to explore different ways of being church and determining the viability of the increasing number of pastoral charges that seem to need more than the part time ministry positions they can afford. Exploration of that need goes far beyond the purview of this task group.

The Task Group has two major recommendations and several that would refine the processes if the first two are accepted. The two major recommendations are:

1. Retain the Transfer and Settlement processes, but change the policy to provide the flexibility that allows Candidates the same choice that is provided to pastoral charges, and no longer require individuals to agree to accept the Transfer and Settlement system at the time they become Candidates. Instead, by February 1 of the year of anticipated ordination or commissioning they must choose transfer and settlement or call/appointment. This choice would be final for that year.

2. *The Manual*, Section 29 (g) be deleted. It states, “Candidates shall not normally be placed into Pastoral Charges or other ministry settings where they have served a Candidate Supply or Student Supply appointment, or internship, field placement, or internship. Placements shall not be arranged or assumed prior to the annual placement meeting.”

Mandate

The mandate of this task group is to, “closely examine the current Transfer and Settlement process to see if it is indeed a policy that serves the current needs of the church; and that if this examination determines that the process no longer effectively serves the need of The United Church of Canada ... to act immediately to develop a new policy that will effectively serve the needs of the whole church.” (Petition #126 GC38, 2003) (Appendix A)

In order to accomplish this, the task group was to:

1. Review previous studies and or reports that have been carried out regarding transfer and settlement;
2. Design and carry out a process for wide consultation which will include such groups as:
 - a) Conference Executives or Pastoral Relations/Settlement Committees;
 - b) Candidates and faculty of the Centre for Christian Studies and various theological colleges;
 - c) Pastoral Charges that have applied for settlement during the period 2002 to 2007; and
 - d) Persons who have applied to be settled during the period 2002 to 2007.
3. Make recommendations regarding the policies of transfer and settlement to General Council through the Permanent Committee on Ministry and Employment Policies and Services (PC-MEPS.)

Members

Dwaine Dornan - Lay - Saskatchewan (GCE member of PC-MEPS)

Bill Ford – OM – Toronto (Chair of Transfer Committee)

Glenn Morison – OM- Manitoba Northwestern Ontario

Linda Thompson - Lay - Toronto

Alison West –OM – Saskatchewan, Task Group Chair (PC-MEPS member)

Staff :

Gail Franklin, GCO, MEPS Unit (Administrative Support)

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Task Group History

Because of the heavy work load of the MEPS Permanent Committee and Unit, the task group to deal with Petition 126 was not established until 2005. In order to move the process as quickly as possible, a sub group of five members of the permanent committee was established in hopes of completing work in order to report to the 39th General Council 2006. This group did some

preliminary planning consisting of risk analysis, determining areas in and out of scope, listing stakeholders, reviewing previous studies, and planning consultations. The chair of the Transfer Committee was invited to the second meeting, and he shared some history and other information about the work of the Transfer Committee. The task group informed him of its plans.

Both time and budget constraints made it obvious that the group would not be in a position to report to the 39th General Council 2006. Therefore, it was decided to expand the group to include persons who were not members of the permanent committee. The first attempt to add two persons was not successful. The PC-MEPS became aware of criticism suggesting that the Transfer and Settlement Review Task Group was possibly predetermining the outcome of their work. Although the original group was acting to accomplish the intent of the petition without a specific result in mind, it was decided that, not only must we work objectively, but we must be seen to work objectively. Therefore, PC-MEPS decided to rework the mandate of the task group naming two of its members and requesting Committee Member Services to recruit three others during the 2006 fall nominations process.

At its first meeting in April 2007, the above named task group reviewed the work done by the previous PC-MEPS group, including distribution of previous studies, revision of the risk analysis and refinement of the consultation plan. The methods of consultation and analysis are indicated in a separate section below.

We noted that, although the original petition used both the words, “process” and “policy,” the direction given was to “closely examine the current Transfer and Settlement process to see if it is indeed a **policy** that serves the current needs of the church.” The second directive was, “that if this examination determines that the Transfer and Settlement process no longer effectively serves the need of The United Church of Canada, that the General Council act immediately to **develop a new policy.**” Notwithstanding the difficulty in totally separating process from policy, we determined that our primary task was to examine policy and was not to change the current processes concerning Transfer and Settlement.

Background

As noted in the first ‘whereas’ clauses in Petition 126, “the current Transfer and Settlement Process, defined in *The Manual*, was designed decades ago for a church in much different circumstances than today;” It is probably safe to say that it was one of the compromises needed to bring about the union of the three original denominations. Evidence suggests that it was a system that served the church well for many years.

At its April meeting of 1978, the Executive of the General Council directed that a consultation take place to consider, “the requirement of mandatory transfer and settlement of ordinands and those to be commissioned.” (G.C. Exec. Apr. 25-28/78) According to the background given for this decision, one of the major indicators for the need of such a study was the, “experience in recent years.” “Increasing numbers of ordinands have voiced their dissatisfaction with the requirement of mandatory Transfer and Settlement at the time of ordination.”

In 1979 the Division of Ministry, Personnel and Education (MPE) reported on the results of the study. Twenty five questions had been widely circulated to stakeholders and the report included

a summary of the responses. The report dealt extensively with responses to each question, but there was no evidence of specific recommendations. The materials in the report may well have been useful for the Task Group established by the 28th General Council 1980.

The task group established in 1980 understood its mandate to be, “to present a series of systems by which the church could deploy, or in other words, order gifts and assignments for its ordinands and commissionands.” Since the task group was mandated to present multiple options, it outlined twelve possible systems. However, the task group did offer its preference for one of the last three options presented: a system in which pastoral relationships matched by the transfer and settlement process is optional for all ordered ministers; refining and improving the present system; or a system where all ordered ministers are required to be settled to the wider church twice, the first within the first 15 years of ministry. Its report had noted that, “Although we received many responses from all parts of the church and while *all* responses described problems surrounding our present policies, *none* could offer any new system by which we could assign new ordinands/ commissionands to their first placement.” the 29th General Council 1982 apparently chose to remain with what was current then, but with some amendments to the process.

The 31st General Council 1986 again mandated the Division of Ministry, Personnel and Education to, “study the transfer and settlement process in the light of a theology of call to ordered ministry...”. A task group was established by the division at its annual meeting in 1988. Interestingly, this task group re-affirmed the last quotation in the above paragraph. In its survey it requested response to four possible systems:

1. Transfer/Settlement once, minister chooses time
2. Transfer/Settlement twice, minister chooses time
3. Settlement only for all changes in pastoral relations
4. Call only for all changes in pastoral relations

Not surprisingly there was no consensus for any of the four. In fact, there were more negative responses for each of the four than there were positive responses. The greatest support appeared to be for the first with 37.83 % positive responses reported. Only the fourth represented a departure from the policy of compulsory Transfer and Settlement, and it had the fewest positive responses recorded. The task group submitted six Resolutions to the 33rd General Council 1990 suggesting changes to processes but not recommending significant change to the basic policy of compulsory Transfer and Settlement.

A major revision of the processes of Transfer and Settlement was contained in the proposal for the Unified Placement Process which was adopted by the 37th General Council 2000 through Resolution 26 (amended). Our understanding is that this Service was to be implemented by the Division of MPE in consultation with the Transfer Committee. Search of minutes of GC37, GC38, GCE of November 2000, and Division of MPE February 2001 indicate several problems may have contributed to the failure to implement the Unified Placement Service. This was a time of major reorganization in both the structures of General Council and of the General Council Office. It was also a time when there was anticipation of moving from four courts to three. The remit to accomplish that failed. Part of the proposed changes required a remit, the results of which were not known until the 38th General Council 2003. There were also concerns raised by

the Transfer Committee about lack of previous consultation. Budget and time constraints probably also played a part in deciding to delay implementation until results of the remits were known.

The wording of Remit #4 accepted by the 38th General Council 2003 was:

The Transfer Committee mandate should extend to Presbytery accountable ministries and that the primary principle which the Transfer Committee uses in determining the transfer of candidates should be the matching of skills and gifts of the candidates with the needs and gifts of the Presbytery accountable ministries.

That change was made by the Manual Committee, but the whole of the Unified Placement Process, although it has elements worthy of consideration yet, has been lost in the transitions.

Theological Rationale

The United Church of Canada acknowledges, even celebrates, variety and diversity that is spoken of in scriptures such as 1 Corinthians 12 as "... varieties of gifts ... varieties of service ... varieties of working "... given "by the same God who inspires them in every one. To each is given the manifestation of the spirit for the common good". It is implied that that variety has resulted in, among other things, the appointment or calling of individual parts within the body to various roles and functions within the body of Christ..." some apostles... prophets... healers... (1 Corinthians 12). By likening diversity to the parts of the body, scripture holds up for us the reality that such diversity necessitates consideration of the uniqueness of each part in the 'care of the body', in so much as, while all parts make a contribution to the body, it is not the same contribution by each particular part. Moreover, while all parts require care, attention and consideration, it is not the same type of care, attention or consideration required by each. Further still, notwithstanding the fact that all parts perform a vital function necessary for the common good of the body, the parts of the whole are each manifestly different. Paul's imagery of the body also reminds us that when one part rejoices, the whole body rejoices and when one part suffers, the whole body suffers.

Acknowledging that variety and diversity, and holding before us the implications that has for the common life of the church and the processes that the church has developed over time to assist in its communal life, the church has also coupled this with a desire to ensure that the biblical principles of fairness and justice for the body and its individual parts is also evidenced by how we live out our life and develop just systems of accommodation and integration for our denomination.

At its inception, The United Church of Canada adopted a system for aligning ministers and pastoral charges that merged and embraced two systems of its founding communions - a system of "Call" from its Presbyterian branch, and a system of "placement" from its Methodist forbearers. Each system considers, to some degree and in some way, variety in gifts: variety in callings; varieties in functions, offered by Candidates and various ministries. The denomination must seek a just balance when considering all parts of the body in its care.

The report "Unified Placement Process" (GC 37, 2000) acknowledges the biblical roots of the concept of "call" to ministry for all people. It also recognises that:

“The church designates those who have been ‘specifically called’ to various ministries ... While ... aspects of call rest solidly on biblical traditions, they are also articulated through the tradition of the church. ‘The church helps to mediate, shape, test and enable the fulfilment of God’s call to individuals...’ (Report of the Task Force on Ministry, 1977)

Throughout history, the United Church has continually sought to clarify ‘call’ and the ‘response’ of individuals and the church. The 33rd General Council 1990 adopted this statement:

In calling people into ministry, the Holy Spirit works in a variety of ways ... Ministry is not the responsibility of the Order of Ministry alone, but of all the people of God... It is important to acknowledge that an individual’s gifts and the Church’s needs should both be considered in responding to God’s claim. While suitability for ministry is not determined by family situation or finance, an individual’s readiness to respond to God’s claim cannot help but be influenced by one’s life situation. The task, then, for the Church and the person is to discern in what context the person’s ministry may most faithfully be exercised. (Theology of Vocation, 33rd General Council Record of Proceedings, p. 373)

Procedures

When the task group was first formed from members of the Permanent Committee on Ministry Employment and Services, (PC-MEPS), staff led the task group through three very helpful exercises. First we looked at the mandate and listed issues that should be considered in scope and those that should be out of scope. Second we did a risk analysis which helped us design our process. Third we listed who we considered to be stake holders in the issue at hand. Later, when the task group was reconstituted, this work was reviewed and edited slightly. This review provided guidance for the group in designing its consultations. The use of church-wide focus groups for broader consultation, which were part of the original plan, was not possible due to financial constraints.

The chair compiled a list of sections of *The Manual*, that refer to transfer or settlement or both (see Appendix B.) In addition, members had been provided with copies of reports from 1979, 1982, and 1986 regarding Transfer and Settlement so that we could have more background as we approached our task. As well as those documents, we read the 1993 Paper entitled “Anticipating Transfer and Settlement”, which had been prepared by the Transfer Committee, and the 2000 Report to General Council entitled, “Unified Placement Process.”

The chair of the Transfer Committee accepted our invitation to the September 2005 meeting of the task group. He provided more background for better understanding of the process.

Several factors led to expanding the group beyond members of PC-MEPS. Most significant was the fact that we had not gone beyond the permanent committee because we thought that, if we began immediately, we could do the work in time to report to the 39th General Council 2006. It

became clear that that was not possible, so we sought wider representation through Committee Member Services.

After reviewing the work of the original group, the newly constituted group decided to consult first with the Conference Personnel Ministers for assistance in seeking feedback from stakeholders. We then sent survey forms to:

- Chairs of Settlement Committees; (Appendix C)
- Presbytery Pastoral Relations Committees; (Appendix D)
- Pastoral charges that had requested settlement within the period 2002 to 2007; (Appendix E)
- Individuals who had requested transfer and/or settlement during that same period of time. (Appendix F)

Some questions required a rating response of 1 to 5. One indicates 'very ineffective' and 5 'very effective'

Principals of all United Church theological schools were later invited to share whatever information or wisdom they might have concerning transfer and settlement and its affect on students. (Appendix G)

The Task Group also wanted to know what policies other denominations used; therefore, we researched the following:

- The Anglican Church of Canada;
- The Baptist Convention of Ontario and Quebec;
- The Evangelical Lutheran Church in Canada;
- The Free Methodist Church in Canada;
- The Presbyterian Church in Canada; and
- The Uniting Church in Australia.

Results

The Task Group was aware that the transfer and settlement process has two parts. All candidates experience the same transfer process conducted by the General Council Transfer Committee. The settlement process varies significantly from conference to conference. In the design of our questionnaire, we did not solicit evaluation of the two parts separately, but rather, of the entire transfer and settlement experience. However, the task group did receive distinct comments relating to both the transfer and the settlement processes.

Six (6) of the thirteen (13) Conference Settlement Committees responded to our survey. Five (5) of them provided numbers indicating that, in those conferences in the period 2002 to 2007, two hundred and sixteen (216) pastoral charges had requested settlement and one hundred and forty-one (141) had received settlement. In total sixty-five percent (65%) of the charges requesting settlement were settled and thirty-five (35%) were not. Percentages ranged from a high of ninety-two (92%) to a low of fifty-six percent (56%). Clearly, the major reason for settlements not occurring is lack of the required number of Candidates. Most Candidates who requested settlement were settled. For those who were not settled, limiting conditions or lack of appropriate fit were the reasons given. A few pastoral charges that did not receive settlement were later able

to call. Many received appointments, and many, particularly part time vacancies, remained vacant.

Four (4) of the Settlement Committees rated the process/policy as effective (either 4 or 5.) One rated it as 3 because some find it very positive and others very negative.

Thirty-two (32) of ninety-one (91) Presbytery Pastoral Relations Committees responded. (see Appendix H). Five (5) rated the process/policy as very effective, sixteen (16) as effective, seven (7) neutral, and four (4) ineffective. In other words, sixty-six per cent (66%) or a majority, rate it highly, and thirty-four per cent (34%) are less than enthusiastic. The majority of the comments related to the process, as opposed to the policy. Most were positive although there are a variety of concerns that relate to both process and policy. Limiting conditions result in many difficulties as do part time vacancies. Another general area of concern relates to the clarity and timeliness of paper work, including Needs Assessments.

Forty-two (42) pastoral charges responded to our survey representing ninety-two (92) settlements (see Appendix I for summary.) This group was the most positive regarding the process/policy. There were eighty-eight (88) responses about efficacy. Seventy-six per cent (76%) rated them as four (4) or five (5), while twenty-four per cent (24%) rated three or lower. Ten (10) of the settlements were for commissionands, one (1) was listed as other, and the other eighty-one (81) were for ordinands. Although the number of commissionands was too low to draw absolute conclusions, there appeared to be little difference in the rating percentages between settlements for ordinands and commissionands, except there were no ratings of three (3).

There were responses from one hundred and thirty-seven (137) individuals who had requested settlement in the years 2002 to 2007, all of whom had been settled. (see Appendix J for summary.) The level of dissatisfaction in this group was the highest of all groups surveyed. Forty-nine percent (49%) were satisfied to some degree, twenty-nine percent (29%) were dissatisfied and twenty-two percent (22%) were neutral. Diaconal ministers, although fewer in number than those who were ordained, gave more negative responses as a group. Only two (2) of ten (10) rated efficacy at 4 or 5, two (2) at 3 and six (6) lower.

Thirty-six (36) of the settlement pastoral relationships, reported by individual survey respondents, have since ended. Ten (10) of them ended in less than three years, sixteen (16) in three years, and ten (10) after more than three years. Twenty-nine (29) are continuing beyond three years.

There were some differences among the conferences. Clearly the level of individual satisfaction is the greatest in the Maritime Conference followed, to a lesser extent, by Saskatchewan. The lowest level appeared to be in Manitoba Northwestern Ontario. The lowest level of pastoral charge satisfaction was in Newfoundland and Labrador.

Appendix K lists specific comments about the process/policy from individuals categorized by the rating identified by the individuals. It is interesting to note that even those who rated the process/policy as either four or five had negative comments, suggesting changes are necessary.

In response to our request for wisdom from theological schools we received five responses. One indicated complete satisfaction with transfer and settlement process/policy. Their only suggestion was that it would be an improvement to have all the meetings at the same time. Another indicated a keen desire to see change moving in the direction of “post-testamur apprenticeship.” Three indicated a degree of satisfaction in that the system has and is serving many well. At the same time they identified a number of concerns and advocated a more flexible system. All three also gave specific examples of persons who were discouraged from candidacy because of the process/policy. Our task group had speculated about this but had no hard evidence until we received these responses.

In The Anglican Church of Canada, practices and procedures are established by the specific diocese. Candidates are Candidates of a specific diocese. Normally, ordinands are assigned to a curacy by the bishop following ordination.

Ordination. in the Baptist Convention of Ontario and Quebec, “is the right and privilege of the local congregation.” There is no centralized placement procedure.

The final step in candidacy in the Evangelical Lutheran Church in Canada consists of a written examination and interview by the Examining Committee of the Candidate’s Synod. If this “Final Evaluation” is successful, the “Examining Committee” recommends the Candidate to the Synod Council and the bishop recommends the Candidate for call.

The Free Methodist Church in Canada, through the Ministerial Guidance and Placement Committee, appoints pastors to local churches.

Candidates in the Presbyterian Church in Canada may seek a call only after receiving a letter of permission from the college approximately three months before anticipated successful graduation. Upon graduation with testamur and receipt of a presbytery approved call, the Candidate may be ordained.

The Uniting Church in Australia uses a call system. The power of a congregation, Presbytery, or Synod to call may be delegated in whole or in part to an Advisory Committee on Ministerial Placements.

Conclusions

1. Clearly the majority of both individuals and groups consulted accepts, is satisfied with, and is well served by transfer and settlement.
2. It is also clear that there is a significant minority that does not accept the system, nor is it well served by it.
3. There is lack of consistency. Pastoral charges may choose between requesting settlement or issuing a call, while Candidates are not given the choice to accept a call.
4. There are varied needs for both pastoral charges and individuals that require different approaches.
5. The hope expressed in *The Manual* - to provide all ministry personnel with a pastoral charge and all pastoral charges with a minister - is not being accomplished now, yet there is concern that if we let go of the policy of compulsion, that situation will become worse.

6. Most of the other denominations we researched have systems of assisting Candidates to establish a first call that are more flexible than a policy of compulsory settlement
7. There is need to explore different ways of being church and determining the viability of the increasing number of pastoral charges that seem to need more than the part time ministry positions they can afford. Exploration of that need goes far beyond the purview of this task group.

Recommendations

The task group recommends to the Permanent Committee on Ministry and Employment Policies and Services that:

1. Retain the Transfer and Settlement processes, but change the policy to provide the flexibility that allows Candidates the same choice that is provided to pastoral charges, and no longer require individuals to agree to accept the Transfer and Settlement system at the time they become Candidates. Instead, by February 1 of the year of anticipated ordination or commissioning they must choose transfer and settlement or call/appointment. This choice would be final for that year.
2. *The Manual*, Section 29 (g) be deleted. It states, "Candidates shall not normally be placed into Pastoral Charges or other ministry settings where they have served a Candidate Supply or Student Supply appointment, or internship, field placement, or internship. Placements shall not be arranged or assumed prior to the annual placement meeting."
3. Since candidates will now have the option of pursuing a call, the Transfer Committee will no longer use the formal term "limiting conditions." The process will continue to honour reasonable accommodation, especially, but not exclusively, related to human rights concerns.
4. An incentive to choosing transfer and settlement be established; for example, a General Council funded financial incentive for each of the first three years.
5. Such changes take effect for commission and ordained in the year 2011.
6. Such policy changes be evaluated, to determine whether they meet the diverse needs of the church, following five years of implementation.
7. The results of such an evaluation be reported to the following General Council.
8. The PC-MEPS initiate and encourage the communication and integration of this report with related work being done through the Executive of the General Council.
9. If a remit is required to implement these recommendations, that the results of the remit be implemented immediately upon receipt of the Decision.