

# THE EPISCOPAL DIOCESES OF EASTERN & WESTERN MICHIGAN

## TRANSITION MINISTRY:

### CLERGY LEAVE-TAKING: CLERGY ESSENTIALS

#### Leave Taking

As the Priest is preparing to leave a congregation, it is important to plan the leave-taking in a way that celebrates what has taken place and brings a sense of closure between the cleric and parish. The relationship of the outgoing priest to the congregation has a profound impact on the capacity of the congregation to accept the ministry of the incoming priest. Leading a healthy, caring, and clear goodbye to a congregation helps effect a good beginning to the transition of one's vocational life as well as assisting the congregation to have a healthy transition to the next clergy person.

The following is collected wisdom and good practices about an important moment in the life of every ordained person, and the congregations with whom they have been in ministry.

#### Steps to take before...

1. Begin planning your departure **early**. Sufficient notice to the Bishop is done in an in-person meeting followed up by written notice including the date of your last service. Sufficient notice is considered to be **6 – 8 weeks** when accepting a new call, and **3 months**, if **retiring** so that there is time for everyone to process feelings, to put parish business in good order, and to prepare the wardens and vestry for their role in the transition.
2. After notifying the Bishop, notify the Canon of your Collaborative so they can come alongside both you and the congregation and help to support the transition.
3. Timing of the announcement is critical. Although it might seem appropriate to inform the congregation as soon as possible, a long period of good-bye can result in feelings of restlessness and a “lame duck” situation.

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4. Follow this order in sharing the news of your departure:
  - a. The Bishop in person and in writing
  - b. The Canon of your Collaborative. Make an appointment for the Canon to meet with your Vestry as soon as possible after this news will be received by the Vestry.
  - c. The Wardens are notified in person and in writing.
  - d. With the Wardens notify the Vestry of your decision to leave. The Vestry will accept your resignation in writing with a copy being sent to the Diocesan office.
  - e. Parish staff
  - f. Congregation
  - g. Local community leaders and other diocesan leaders (you may need to resign your seat on community or diocesan committees)
  
5. Following Diocesan policy, with the vestry, clarify the terms of unused leave or vacation time, plans for continuing contributions into the Church Pension Fund, and arrangements for insurance coverage.
  
6. Two letters are then sent to the congregation:
  - a. One from you expressing gratitude for your mutual ministry and your intent to end the ministerial relationship with the parish. It is helpful to share information about what your future plans may be.
  - b. One from the Wardens, setting forth the Vestry's plan for leave-taking and the parish's future, expressing affirmation and hope.
  - c. Typically these letters are emailed and mailed on the same day or the day after an announcement is made to the congregation in the context of a principal worship service.
  
7. Notify the Benefits Administrator of the Diocese and the Church Pension Fund in writing, including the date of your last service. If you are retiring, secure the proper forms from Church Pension or the Diocesan Benefits

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Administrator. The Bishop's signed approval is required for retirement and needs several months lead time.

8. Share with the Wardens and begin filling out the "In/Out Processing Checklist for Clergy". This will be available from your Collaborative Canon and on the Diocesan website. Note the request to send a forwarding address to the diocesan office.
9. Develop an agreement with the Vestry and let the congregation know, in writing, that:
  - a. You value their friendship;
  - b. After you leave, while you will remain friends, you will no longer be able to function as their pastor or priest
  - c. You will no longer officiate at their baptisms, weddings, and funerals.
  - d. During the time between rectors/priests-in-charge, you may not function as a priest in the parish without permission of the Bishop and at the request of the Sr. Warden.
  - e. At the invitation of your successor you may attend worship or participate in a liturgy. You may not attend worship at the invitation of any staff or laity. During such a visit your participation is as a guest, and opinions of the existing state of the congregation are to be kept to yourself.

## **Preparing To Leave**

1. Schedule and plan an exit interview with the Canon of your Collaborative and one with the vestry and parish leaders.
2. Schedule your Collaborative Canon to conduct a Mutual Ministry Review of ministry with the Vestry and parish leaders.
3. List all your current responsibilities, and where appropriate assign a hand off date, and designate a specific person to take up that task.
4. Invite anyone who may have "unfinished business" with you to make an appointment to talk. Meet privately with individuals with whom there may have been tension or conflict.

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5. With the Wardens, review all leadership positions, clarifying roles and responsibilities.
6. Update job descriptions of paid staff.
7. For sacramental services previously scheduled for dates after you will be leaving, make families aware of your inability to officiate and help them find replacements.
8. Plan for a liturgical ending with the parish in the context of worship (see Book of Occasional Services). Coordinate with your Collaborative Canon so that a representative from the Bishop's office can participate.
9. Plan to say a formal goodbye to shut-ins, staff, and parish groups.
10. Plan final visits with individuals with whom you have special relationships.
11. Plan ways of saying goodbye to those who have been particularly supportive.
12. Make sure to clean out your office by the time of the official "last Sunday," but do so gradually.
13. Clean out personal files, including computer files. You may wish to leave files that would be helpful to the next priest. Consult with your Collaborative Canon about the handling of confidential pastoral information.
14. Prepare a thank-you and/or farewell piece for the parish newsletter.
15. Within the context of preaching the gospel, name your feelings and issues of closure in sermons. Do so in ways that allow you to share the experience of change and loss with the congregation, but **don't** lure the congregation into taking care of your feelings of sadness or ambivalence.
16. Have a party, in whatever style is most comfortable for the congregation. Remember, this is about closing well so the congregation can begin well with their next priest.

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## **Organizing for Your Successor**

### Leadership

1. Review with the wardens and vestry their leadership responsibilities for property, finance, and administration during the transition.

### Pastoral

1. Be sure that a clergy person is willing to serve the pastoral needs of the parish during the transition. Ensure that the lay leaders know about this arrangement.
2. Identify those in nursing homes, assisted living facilities, and home bound, noting who expects to be visited and with what regularity.
3. Note significant pastoral concerns such as premarital counseling, pregnancies, divorces in process, terminally ill, and the bereaved, remembering to maintain confidentiality of matters that are pastorally sensitive. This information should be left in writing for the interim priest and may be delivered by the Sr. Warden or by the Collaborative Canon.
4. Note preplanned funeral arrangements and where that information is filed.
5. Encourage and emphasize hospitality for welcoming new clergy and their loved ones.
6. Let people say good-bye, thank you and give you their blessing.
7. Help the wardens to understand the process for scheduling supply clergy. Ensure they understand that supply clergy are not plentiful and that there will be times when worship leaders and lay preachers will need to officiate and preach at Morning Prayer services.
8. Make plans to worship with another congregation.

### Administrative

1. Prepare a calendar for the upcoming year, including Episcopal visitations, homecoming, patronal feasts, Holy Week, Easter, Diocesan Confirmation,

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- Christmas, sunrise services, graduations, every member canvas, stewardship, and annual meeting.
2. Leave clear instructions about your congregation's participation in community or ecumenical services, as well as their expectations about preaching and hosting future events.
  3. Make sure parish lists and service registers are up to date.
  4. Deposit historic documents with the Clerk of the Vestry or parish archivist.
  5. Take out the trash. Throw away clutter that has accumulated and is no longer in use.
  6. Arrange for personal and professional change of address and mail forwarding. Notify those outside the parish of your new email address.

## Finances

1. Make a list of any special funds, their purpose, use and signatories, including scholarships and other financial commitments.
2. Work with the parish treasurer to reconcile the discretionary fund account(s) and turn it/them over to the wardens.

## Gather in a notebook or a set of files

1. As a kindness to your successors (whether interim or settled) leave a notebook. Not a "how to" but a "where to". Where to get good take-out food, get a good haircut, find a dentist, etc.
2. Prepare a file of audits, parochial reports, annual reports, copies of budgets for five years, and by-laws.
3. Identify the location of the safe and who knows the combination.
4. Identify the location of bank deposit box and who has the keys.
5. Prepare a file of service leaflets for the past three years.
6. Prepare a file of Vestry, Eucharistic Ministers and Visitors certificates, lists of current altar guild members, ushers, acolytes, and servers with contact information (phone numbers and email addresses).
7. Create a contact list of parish leaders including roles and email addresses.
8. Describe unique parish customs for the conduct of worship especially weddings and funerals.

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9. Prepare a file of current agreements and contact information for all groups that use the buildings.
10. Note the location of home communion set, chrism, last year's palms, the nativity set, etc.
11. Turn in your keys, clearly tagged.
12. Establish a date certain for moving out of church-provided housing and your office.

## NOT the clergy person's responsibility

If clarification is needed, the vestry should request guidance from the Collaborative Canon for:

1. Planning farewell events for the clergy person.
2. Calling for or arranging for a Search/Discernment Committee.
3. Making predictions or giving assurances about future clergy leadership, transition periods, search processes, or other transition items that occur after the clergy person is no longer present with the congregation.
4. After your last day, do not return to the office to check for mail, email, or phone messages.
5. In all cases, the responsibility belongs to the clergy leaving to make clear that the pastoral relationship has ended. The clergy person will not communicate with former parishioners about matters involving the church.
6. Do not triangulate with members of the congregation and your successor.
7. Remember, you have no official or canonical role in the parish you leave and your priestly, pastoral, and administrative functions end on the effective date of your resignation or retirement.