

## Leave-taking Essentials for Clergy

*A good beginning depends on a good ending. Your parish's ability to call your successor depends on how well you leave and on your ability to let go. Your character and integrity are demonstrated in how you leave a position. These are not commandments, rubrics or rules. They are collected wisdom, good practices and occasional humor about an important moment in the life of every ordained person, a moment of celebration, of ending, of beginning, of death, and of resurrection.*

### Leave-taking Essentials

Inform the Bishop in writing of your leaving and the date of your last service.

Notify the wardens (in person) and, with the wardens, notify the vestry of your decision to leave.

Canons require the vestry to give formal consent of your resignation.

The canons require the wardens to notify the bishop in writing that the parish is without a priest.

With the wardens, send a letter to the congregation announcing that you are ending your pastoral relationship and expressing your gratitude for your mutual ministry.

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.

Notify the Church Pension Fund, securing the proper forms, if you are retiring. The bishop's signed approval is required for retirement.

Plan a ritual ending of your pastoral relationship within the context of worship. Refer to the Book of Occasional Services for suggestions.

Plan an ending with parish organizations and staff.

### Communicating Your Decision

Assist the wardens with writing a letter to the congregation that outlines your plan for leaving and assures them that they will have support and guidance from the diocesan staff through the transition.

Develop an agreement with the vestry and let the congregation know, in writing, that,

- you value their friendship;
- after you leave, you will no longer be able to function as their pastor or priest;
- it no longer will be your role to officiate at their baptisms, weddings, and funerals;
- you will come back only at the invitation of your successor; and then,
- you will attend as their former pastor.

Notify local ecumenical groups or clergy associations that you are leaving and resign from positions you hold in community organizations.

### **Preparing To Go**

Schedule an exit interview with the canon for deployment and a mutual review of ministry with the vestry and parish leaders.

List all your current responsibilities, assigning a handoff date, and designating a specific person to take up that task.

With the wardens, review all leadership positions, clarify roles and responsibilities.

Update job descriptions for paid staff.

Meet privately with individuals with whom there may have been tension or conflict.

Be clear about any commitments (baptisms, weddings, funerals) you have scheduled for immediately after your leave-taking date.

### **Organizing For Your Successor**

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

Identify those in nursing homes, assisted living facilities, and home bound, noting who expects to be visited and with what regularity.

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.

Note preplanned funeral arrangements and where the information is filed.

Prepare a calendar for the upcoming year, including Episcopal visitations, homecoming, patronal feasts, sunrise services, graduations, every member canvas, stewardship, and annual meeting.

Leave clear instructions about your congregation's participation in community or ecumenical services, as well as their expectations about preaching and hosting future events.

Balance the discretionary fund and turn it over to the wardens.

List any special funds, their purpose, use and signatories, including scholarships and other financial commitments.

Prepare a file of audits, parochial reports, annual reports, copies of budgets for three years, and bylaws.

Identify the location of the safe and who knows the combination.

Identify the location of the bank deposit box and who has keys.

Make sure parish lists and service registers are up to date.

Preserve historic documents.

Clean out personal files. Keep what you need and carefully dispose of the rest.

Prepare a file of service leaflets for the past three years.

Prepare a file of lay reader certificates, lists of current altar guild members, ushers, acolytes, and servers with contact information (phone numbers and e-mail addresses).

Describe unique parish customs for the conduct of worship especially weddings and funerals.

Prepare a file of current agreements and contact information for all groups that use the buildings.

Note the location of home communion set, chrism, last year's palms, the nativity set, etc.

Take out the trash. Throw away clutter that accumulated from rummage sales in closets, storage areas, or garages.

Leave a notebook. Not a 'how to' but a 'where to.' Where to get a decent haircut, find a dentist, order Chinese takeout, etc.

Create a contact list of parish leadership, including roles and e-mail addresses.

Turn in your keys, clearly tagged.

Establish a date certain for moving out of church-provided housing and agree on conditions of repair and cleanliness.

Encourage and emphasize hospitality for welcoming new clergy and their loved ones.

Let people say good bye, thank you, and give you their blessing.

Assist wardens in making arrangements for temporary emergency pastoral coverage immediately following your leaving.

Don't leave anything for the next priest. If it needs to be done, do it. Too many arriving clergy are sunk by things left undone.

### **Relating After You Leave**

Arrange for change of address and mail forwarding.

After your last day, do not return to the office to check for mail, e-mail, or phone messages.

In all cases, the responsibility belongs to clergy leaving to make clear that the pastoral relationship has ended.

Never be involved with the search process including giving names or offering opinions about candidates.

Avoid getting triangulated with members of the congregation and your successor.

Be clear that it is not appropriate for you to discuss any parish business after you leave.

Make plans to worship with another congregation.

In the absence of a rector or interim pastor, the wardens are canonically responsible for the worship, finance, property, and administration of the parish.

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 retirement or resignation.

### **Resources**

Running through the Thistles. Weese, Carolyn and Crabtree, Russell. *The Elephant in the Board Room*. San Francisco: Jossey-Bass, 2004.

White, Edward A. *Saying Good-bye: A Time for Growth for Congregations and Pastors*. Alban Institute, Inc. 1994.

Church Pension Group website at <http://www.cpg.org/>.

*With gratitude to the Rev. Thomas Orso, Canon for Deployment for the Episcopal Diocese of New York for sharing this amazing and thorough pastoral checklist.*