



## **Leave-Taking Guide for Ministry Leaders**

Guidelines to assist Ministry Leaders\*, Wardens and Vestries/BCs/Chapters in saying goodbye when the Ministry Leader has discerned that they are ready to end their ministry relationship with the congregation.

\* Rectors, Vicars, Priest-in-Charge or Lay Pastoral Leaders

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## Steps to Follow for Ministry Leaders and Wardens

- Ministry leaders will first meet with the Bishop and/or the Canon to the Ordinary to discern an end date and announcement together. Depending on the situation, notice of two months to six months may be appropriate.
- Clergy retiring from ministry should speak with a representative of the Church Pension Group regarding pension benefits and appropriate paperwork. Clergy accepting a new call in another diocese will need to work with the receiving diocese to continue pension and benefits payments. Clergy accepting a new call in another diocese will also need to request Letters Dimissory from the Office of the Bishop.
- Wardens will make an appointment with the Canon to the Ordinary to discuss the needs of the congregation and next steps. During the time that the church is without an official Ministry Leader, the Wardens and Vestry/BC/Chapter are the formal and canonical leadership of the congregation and, in consultation with the Canon to the Ordinary, will decide on a course of action for the congregation.
- With the help of the Canon to the Ordinary, the Wardens will plan for the conduct of worship and pastoral care until a priest is appointed.
- Shortly after the clergy's leaving has been announced, the Wardens will meet with the clergy to negotiate a separation agreement which must be approved by the Canon to the Ordinary. **(See "A Letter of Understanding Concerning the Ending of the Pastoral Relationship" included in this packet.)**
- The Wardens, Vestry/BC/Chapter and ministry leader together should plan and implement a celebration of the ministry leader's ministry.
- The Bishop or the Canon to the Ordinary will visit the parish as soon as possible following the departure of the priest. The visit may take the form of preaching at worship, meeting with the congregation, or meeting with the Vestry/BC/Chapter.

### Saying Good-bye

The Vestry/BC/Chapter, parish, and clergy together should plan and carry out the farewell and celebration of the priest's ministry, generally before any formal work on the search begins. Whether the priest is leaving because of retirement, a call to another parish, or even because of differences with the parish, the elements of the separation process remain the same. Much of the energy of the parish during this time should be devoted to saying "good-bye". Until the clergy leaves, the primary tasks are to arrange an exit interview, plan the current priest's departure and provide opportunities for people to say good-bye in a celebratory manner.

## Exit Checklist for Clergy

A good beginning depends on a good ending. Your church'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 and good practices about an important moment in the life of every ordained person, a moment of celebration, ending, beginning, death and resurrection.*

### Communicating Your Decision to the Congregation

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

Develop an agreement with the Vestry/BC/Chapter and let the congregation know, in writing, that you care about them and will be praying for them, and that;

- After you leave, you will no longer be able to function as their pastor or priest;
- You will no longer officiate at their baptisms, weddings, and funerals; and
- You will visit or interact with them only at the invitation of your successor.

### Leave-taking Essentials for Clergy

- Inform the Bishop in writing of your leaving and the date of your last service. (See **Letter of Understanding Regarding the Ending ...** page 8)
- Notify the Wardens (in person) and with the Wardens notify the Vestry/BC/Chapter of your decision to leave.
- 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

## Before you leave

- Schedule an exit interview with The Canon to the Ordinary and the Wardens.  
Schedule private exit interview with the Bishop.
- List all your current responsibilities, assigning a hand off date, and designating a specific person to take up that task.
- With the Wardens, review all leadership positions, clarify roles and responsibilities.
- Make sure you and the Wardens/Vestry/BC/Chapter are clear about all financial commitments to each other and how to handle whatever vacation time remains (see letter of understanding)
- Update job descriptions for any paid staff. Thank them and pray with them.
- Meet privately with individuals with whom there may have been tension or conflict. Pray with them.
- Notify local ecumenical groups or clergy associations that you are leaving and resign from positions you hold in community organizations.
- Be clear about any commitments (baptisms, weddings, funerals) that are scheduled to occur after your leave-taking date for which alternate arrangements must be made.
- Review with the Wardens and Vestry/BC/Chapter their leadership responsibilities for property, finance, and administration during the transition.
- Communicate all passwords to accounts including social media, email systems, zoom accounts, financial, etc. Train lay leaders to use these tools.
- Identify those in hospitals, nursing homes, assisted living facilities, and home bound, noting who expects to be visited and with what regularity. Be sure there is a list of the names, addresses and contact information for all of these.
- 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 Senior Warden or the Canon.
- 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.
- Make a list of 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 by laws.
- Identify the location of a 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 Eucharistic Ministers and Visitor certificates, lists of current altar guild members, ushers, acolytes, and servers with contact information (phone numbers and e-mail addresses). Pray with them and thank them for their ministry with you.
- 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 has accumulated and is no longer in use.
- 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, get ice cream; take a stress reducing walk or jog, etc.
- Create a contact list of parish leaders including roles and email addresses. Pray over the list. Give thanks for your ministry together

- Turn in your keys, clearly tagged.
- Establish a date certain for moving out of church-provided housing.
- Encourage and emphasize hospitality for welcoming new clergy and their loved ones.
- Let people say good-bye, thank you and give you their blessing. Accept them!
- Assist Wardens/diocesan staff in arranging temporary emergency pastoral coverage for the time immediately following your departure.
- 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.

## **After You Leave**

Arrange for change of address and mail forwarding. Notify those outside the parish of your new e-mail address.

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

In all cases, the responsibility belongs to clergy leaving to make clear that the pastoral relationship has ended. Know your diocesan guidelines about this, convey them to the vestry and congregation verbally and in writing, and uphold them if contacted after you leave.

It is expected that clergy will not communicate with former parishioners about matters involving the church and will not meet with any members of the church for any reason during the interim period until new ordained leadership is fully integrated into the life of the church, and then only at the invitation of the new rector.

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.

Make plans to worship with another congregation. Pray and/or seek spiritual counsel about this, especially if you are retiring.

In the absence of a rector or interim priest, the Wardens are canonically responsible for the worship, finances, 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 resignation or retirement. However, you may hold your former congregation and its people in your prayers.

Do not engage in any parish-based social media platforms or in social media interactions with those affiliated with the parish.



## **A Letter of Understanding Concerning the Ending of the Pastoral Relationship**

**Purpose:** To set forth the understandings between the Clergy, the Rev. \_\_\_\_\_ (“Clergy”) and Vestry/BC/Chapter of \_\_\_\_\_ Episcopal Church \_\_\_\_\_, California, regarding the ending of the pastoral relationship between the Clergy and the congregation.

**Date of Departure:** The Clergy’s tenure and responsibilities will end on \_\_\_\_\_.

**Date to Vacate the Rectory:** The Clergy and his/her family will vacate the rectory located at \_\_\_\_\_ no later than \_\_\_\_\_.

Prior to the Clergy’s departure, there will be an on-site inspection of the premises conducted by representatives of the Vestry/BC/Chapter accompanied by the Clergy to assess the condition of the Rectory.

### **Responsibilities of Church Leaders:**

- To pay the Clergy’s full compensation and benefits as set forth in the Clergy’s letter of agreement, the final payment to be made no later than \_\_\_\_\_.
- To continue the Clergy’s family health insurance coverage through \_\_\_\_\_.
- To pay in full the Clergy’s pension as billed by the Church Pension Fund through the period of his/her tenure, recognized as \_\_\_\_\_.
- To provide to the Clergy and his/her family, without charge, the use of the Rectory through \_\_\_\_\_ and to provide all utilities, maintenance and repairs required through said date.
- To pay for any accrued but unpaid vacation, sick, or personal days in accordance with the terms and conditions of the Clergy’s letter of agreement.
- To pay all housing equity that has accrued in accordance with the terms and conditions of the Clergy’s letter of agreement.
- To reimburse the Clergy for all business-related expenses and mileage in accordance with the terms and conditions of the Clergy’s letter of agreement.
- To say goodbye well, celebrate the ministry together, and respect boundaries by not contacting the priest after they have left

### **Responsibilities of the Clergy:**

- To continue to fully and faithfully execute the duties and responsibilities required by the canons of the Episcopal Church and the Episcopal Diocese of San Joaquin, the laws of the State of California and the by-laws of the parish.
- To surrender to the Wardens of the Church, all files and computer records held by him/her which in any manner pertain to the financial, spiritual, and temporal affairs of the Church on or before \_\_\_\_\_.
- To remove from the Church and Parish Offices any books, files, records, vestments, or

other accoutrements which are his/her personal possessions before \_\_\_\_\_ . It is understood that any personal property left on the Church's premises after that date, will become the property of the Church.

- To remove from the Rectory all goods and possessions belonging to the Clergy and his/her family before \_\_\_\_\_. It is understood that any personal property left in the Rectory after that date, will become the property of the Church.
- To turn over to the wardens all keys relating to the Rectory by \_\_\_\_\_.
- To turn over to the wardens all keys and passwords relating to the property or management of the Church by \_\_\_\_\_.
- To establish and maintain good boundaries by ending the pastoral relationship clearly and not contacting parishioners or serving in any way after the last day of ministry together.

**Notice of this Agreement:**

This agreement will be approved by a resolution of the Vestry/BC/Chapter of the Church, and duly executed by the Wardens on behalf of the Church, and by the Clergy as evidenced below. A duly executed copy of this agreement and accompanying resolution shall be sent to the Bishop of the Diocese of New Hampshire.

Approved by the Vestry/BC/Chapter of \_\_\_\_\_ Church on \_\_\_\_\_ as attested to by the signature of the Clerk.

\_\_\_\_\_  
Clerk

Wardens \_\_\_\_\_

Clergy \_\_\_\_\_

Date \_\_\_\_\_

Approved \_\_\_\_\_  
Canon to the Ordinary

*The Diocese's interest in this matter is to ensure that both sides reach a fair, full and clear understanding of one another's obligations so that the ministry transition proceeds as smoothly as possible. The Diocese also seeks assurance that the parish is in a financial position to meet its obligations under the separation agreement. Hence, all separation agreements are to be reviewed by the Bishop's Office and must be approved. In this regard, the parish's annual budget, the most recent financial statement and a brief explanation of how the financial obligations of the agreement are to be met must accompany the proposed agreement.*

## **On the Ethics of Clergy Transitions and Boundaries**

For the purposes of this procedure, the term "Rector or Priest" may be applied to vicars, assisting clergy and deacons. The purpose of this paper is to address the sensitive issue that can arise when clergy are invited into a pastoral role by persons who are no longer under their care.

As clergy, bound together by our common mission, and accountable to each other, as well as to the whole church, to foster healthy ministry in all our congregations, we seek a professional ethic that understands and respects the ending of pastoral relationships. That is, when a priest leaves a congregation the pastoral relationships end.

It is understood as a starting point that nearly everything surrounding relationships and transition is sensitive in nature. Inherent in every professional pastoral relationship is a personal relationship. This mix of relationships goes to the very being of who we see and experience ourselves to be as priests in God's church. Without both, none of us could function effectively as pastors to those who have called us into their lives in this role.

It is our experience that boundary issues grow out of healthy pastoral relationships. Said another way, when a good healthy pastoral relationship has been formed, is also when it is most natural for people to seek the presence of the pastor that is known to them, even when that relationship has ended. Weddings, baptisms and funerals are the most common points of a person's life where they might instinctively reach out to a former pastor. In fact we can almost expect that these times will often bring requests to participate.

From the clergy perspective it is both flattering and alluring to be asked to enter people's lives in the ways we have been trained to do. To be asked to be at the bedside of a family member who is dying is to be asked to be who we are. This circumstance, as well as others, are not situations to which we easily say no.

It is understood that, because of the nature of pastoral relationships, on occasion, personal friendships might also develop in the context of the pastoral. Such situations are only natural. However, they should not be taken lightly by the former rector. On a professional level self-examination should take place that asks first and foremost, how much of me is looking to my professional life, that is my pastoral relationships, for my personal friendships? At the same time other questions should be addressed. How do such friendships come to be? How many such friendships do I seem to develop in the context of pastoral relationships? Am I willing and or able to continue these friendships after I leave the pastoral role? What emotional toll will be involved to continue these relationships or, not continue them? What affect could my continuing these friendships have on others with whom I had a pastoral relationship but, choose not to continue with a friendship? There are no certain or clear answers to these questions. However, such issues should be openly and honestly addressed with one's bishop and or spiritual advisor.

It is understood that the most important relationship in dealing with the ethics of clergy transition and boundaries is the one between the former pastor and the new pastor. It is our belief that when this relationship is open, honest and healthy, boundary issues will rarely be a problem. One of the single biggest assets in a new priest beginning his or her ministry is the support and collegial friendship of the previous rector.

It is also understood that it is the responsibility of the former rector to enforce boundary issues. It is not the responsibility of the new rector to have to react to awkward situations that come unexpectedly. It is critical in maintaining appropriate boundaries that the former rector be firm and clear in his/her commitment to appropriate boundaries. It is only under limited circumstances that contact with a former parishioner be initiated by the former rector.

Assuming this, then the situation most commonly addressed is the former parish member contacting a former rector to act again in the pastoral role. In such circumstances it is the responsibility of the former rector to respond appropriately. Such response should be automatic, "I'm really sorry, but it is simply not appropriate for me to do that. You must understand that I care about you, but I am not your pastor anymore." You might even consider giving the new rector a "plug" such as "I know your new rector will do a wonderful job for you at this time." After such a contact it is important that you call the new rector and let him/her know that the contact was made and how you responded. Most critical, when a former parishioner contacts you, is to not fall into the trap of saying something like, "You'll have to talk to the new rector about that, I really can't do it without his/her permission." Often such a response is thought to be out of respect to the new rector. However, the opposite is true. Such a response puts the new rector in a difficult situation. It leaves the new rector in the unenviable position of either relinquishing the pastoral role or saying no and being judged as unresponsive at best and, at worst, uncaring to the pastoral need.

It should also be noted that should a former rector decide to attend a program or worship service at the former parish, they should notify the current rector prior to the event. Consequently, the former rector should treat his/her presence among the community in a discreet manner so as not to distract from the pastoral role of the new rector.

It has been our experience that most clergy are very clear about these matters most of the time. We do need to remember that our former congregations are best served when we respect the boundaries by which we have ordered our lives and ministries.

The Rt. Rev. David C. Rice  
Bishop of San Joaquin

# A Liturgy of Leave-Taking in Thanksgiving for our Mutual Ministry

## Returning the Gifts for Ministry

*After the sermon the exiting priest stands before the congregation and says,*

**Priest:** At the beginning of my ministry, you gave me many things in trust and a charge as to how to use them. Now, I leave these and other things with you, the ministers of St. YYY, its congregation and lay leaders.

**To Worship Leaders:** Continue to share these worship resources (Book of Common Prayer, Enriching our Worship etc.) and these stoles that belong to this church and ensure that the prayers of God's people and, along with the ministry of clergy, the sacraments of the church continue in this place. **Amen.**

**To Lay Preachers:** Continue to use these various translations of scripture and ensure that the word of Christ is preached and proclaimed in this place. **Amen.**

**To Ministers of Music:** Continue to use all these hymnals and ensure that the praise of God continues in this place. **Amen.**

**To Healers:** Continue to use this oil for anointing and ensure that this remains a place of care, healing and reconciliation. **Amen.**

**To Pastoral Caregivers:** Continue to use the congregation's Communion kit and ensure that this remains a place of mutual care, healing and reconciliation. **Amen.**

**To Christian Formation Leaders:** Continue to create Christian Formation programs with vision for the future, so that all may learn of God's love for us in Christ.

**To Senior Warden:** Receive this key and ensure that the doors of this place remain open to all people. **Amen.**

**To Vestry:** Receive these Canons and the Diocesan Handbook and ensure that this congregation continues to be governed in accordance with them and in communion with our Bishop. **Amen.**

**To Leadership Team:** Continue to use this water for the baptismal font and ensure that this remains a place where people are loved and brought into the family of God through baptism. **Amen.**

Let all these be signs of the ministry that is yours and the Bishop's in this place. **Amen.**

*The service continues with the Prayers of the People*

Let us pray.

Eternal God, creator and preserver of all, and provider of grace to all who toil together in the hope of meaningful living: continue your saving work through your Spirit in our midst.

**People: Give grace to your servants, O Lord.**

Grant that our lives, and XXX's in *retirement (her/his new call)*, may continue to be instruments for serving the common good, with time for leisure, for new growth and service.

**People: Give grace to your servants, O Lord.**

Grant XXX, as s/he leaves the accomplishments and trials of the *work place (this congregation)*, a sense of gratitude for those who have shared this journey, both at St. YYY's, in this community, the Church, and the world.

**People: Give grace to your servants, O Lord.**

Give him/her thankfulness for all who have supported her/his life's journey, especially NN, as well as for all those who have shared in her/his spiritual journey, that s/he may continually use insights from her/his path to help others know and serve God.

**People: Give grace to your servant, O Lord.**

Grant her/him wisdom and understanding in *the ordering of retirement life (in her/his new ministry)*, that s/he may be blessed with a positive, hopeful perspective, so that future years may be valued and productive, in service to you.

**People: Give grace to your servants, O Lord.**

Give forgiveness to us and to XXX for all things done and left undone in our common life.

**People: Give grace to your servants, O Lord.**

Grant to the people of St. YYY Episcopal Church the vision to continue on God's journey, to fulfill the mission of St. YYY, that all people might know God and love each other through Jesus Christ our Lord.

**People: Give grace to your servants, O Lord.**

Grant to this congregational family the awareness of those who have gone before us, a thankfulness for their abiding faith, and a willingness to ever seek the kingdom of God, both in this place and beyond its walls.

**People: Give grace to your servants, O Lord.**

To you, O Lord, be the power and glory, now and forever.

**People: Amen.**

### **The Peace**

*Celebrant:* The peace of the Lord be always with you.

*People:*     **And also with you**

*After the blessing and before the closing hymn and the dismissal, the priest sits on a chair placed in view of the congregation and says:*

On the X<sup>th</sup> day of Month Year I started my ministry with St. YYY Episcopal Church as your rector. I have, with God's help and to the best of my abilities, exercised this trust, accepting its privileges and responsibilities.

After prayer and careful consideration, it now seems to me that I should leave this charge, and I publicly state that my tenure as rector of St. YYY ends this day.

*On behalf of the Bishop, the Senior Warden says:*

Do you, the people of St. YYY Episcopal Church, recognize and accept the conclusion of this pastoral relationship? **We do.**

**Closing Hymn and Dismissal**

## **Vestry/Wardens-Clergy Exit Interview Models**

*Exit interviews with clergy and their wardens (or other lay leadership) help ensure a good exit process and identify next steps for the congregation's discernment. These interviews held with a facilitator/ Canon to the Ordinary, whose notes from the meeting are reviewed by all participants for accuracy, corrected if necessary, and shared with the Vestry and the Canon to the Ordinary. Questions may be given to participants in advance so they can think about and pray over their answers prior to the interview meeting. What follows are three examples of questions that might be used in such interviews.*

### **Question Set 1**

1. What is there to celebrate in our ministry together?
2. What did we learn from each other? What lessons should each of us take into the future from our ministry together?
3. What do we all need to pay attention to as we enter the next phase of ministry?

### **Question Set 2**

1. Reflecting on our ministry together, remember a time when you felt the congregation was most engaged, alive, and motivated. What was that time? Who was involved? What happened as a result?
2. What do you value most about this congregation? What activities, ingredients, or ways of life are most important? What are the best features of this congregation?
3. What three wishes do you have for this congregation's future?
4. What are the two things that might be done during the interim to strengthen the congregation for the future?

### **Question Set 3**

1. What is there to celebrate in our ministries together?
2. What are your hopes for this time of transition?
3. What do you want to make sure does not get lost during this time?
4. What do the congregation and the clergy person need **to** pay attention to as each enters the next phase?



## Clergy Exit Interview With Bishop's Office

To completed and brought by clergy to final interview with Bishop and the Canon to the Ordinary

1. Name of Parish \_\_\_\_\_

2. Period of Employment : From \_\_\_\_\_ to \_\_\_\_\_

3. Main responsibilities of your ministry

4. Proudest accomplishment(s)

5. Things I wish I could have done

6. Congregation's greatest gifts and assets

7. Congregation's growing edges

8. The one thing I would like the incoming clergy to know is...

9. Additional comments