

**GRACIOUS ENDINGS AND PRODUCTIVE BEGINNINGS
WHEN A PASTOR RETIRES
Guidelines, Retirement Agreement, and Ministerial Ethics
Carlisle Presbytery
PROLOGUE**

The Commission on Ministry (COM) has pastoral responsibility for all the minister members of the Presbytery. That responsibility needs to be exercised with special care during periods of transition for the minister members. One such period of transition is the retirement of a minister. When that retirement is from a ministry over which the Presbytery has jurisdiction (such as a pastorate or a Presbytery staff position), then the COM must show discretion in assisting the completion of the ministry in such a way that encourages health and wholeness for everyone.

One of the tensions inherent in ministry is that ministers serve churches, but they give up the privilege of being a member of a local congregation. For some, though certainly not for all, membership in the Presbytery fills the void that membership in a congregation fills for most other Christians. The pastor's family, however, usually become members of the congregation which the pastor serves. At the point of retirement from pastoral ministry there is, typically, a sense of loss for the pastor's spouse (and perhaps also for grown children who have remained in the congregation) which differs in quality from the loss experienced by the pastor. While a minister's family does not lie within the COM's jurisdiction, it does lie within our Christian concern. In the hope of loving one another as Christ loves us, the COM institutes a policy of pastoral care toward all ministers and their families around the time of retirement, both to encourage them in their Christian pilgrimage as well as to assist the people in the ministry from which the retirement is being made. Our hope is to move the people forward in the ministry so that they can enjoy the invigoration of all past service and anticipate fresh gifts from new servants of God.

OVERVIEW OF THE SITUATION

The retirement of a pastor is a time of joy, thanksgiving, stress, and anxiety for the congregation, pastor and her/his family.

The Congregation has built loyalties and deep meaningful relationships with the pastor whether s/he has been there for a long or moderate length of time. The members wonder: can't we call on our former pastor from time to time to serve in various special occasions and needs if s/he is nearby? How will we get a new pastor? Will our choice be wise? What will be our congregation's spirit and character in this new venture? How will we relate to this new person? How do we continue in the interim period?

The Pastor retires and faces a radical change in her/his life and for the family. Ever since ordination the pastor and family have been accustomed to being a center of attention, having a congregation that loves, cares for and depends on them. The pastor is used to being the leader of the session and boards, a key decision maker and a guide of the mission and spiritual life of the congregation. When that is suddenly removed it is the death of a major aspect of the pastor's life, a time of mourning.

Few anticipate what a radical reorientation of life, of the sense of call and of the sources of self-esteem and fulfillment that change will require. While retirement has many rewards and the potential of new personal fulfillments, for many the transition to the new orientation can be threatening and difficult. To deny the feelings of loss only continues the pain. It is no wonder that some retiring pastors are tempted to hold on to past relationships and roles to the detriment of the congregation and its new pastor, as well as to the discovery of a new role in life for the retiree. A good guideline is for the pastor to absent her/himself from the former congregation for at least 2 years following the installation of the next pastor.

The Pastor's Family also discovers that the change is difficult and at times painful. Their situation comes

to focus in three questions:

1. Where to live?
2. Where will their church membership be?
3. How to handle church related friendships?

If they move to a new community the adjustment of the former pastor and her/his family to their new life is made easier. Their role in a new community and new church is entirely different from their years of experience in the pastorate. In the new church of membership they are on a level with all other members. They are free to relate directly and freely with members of the new church and to share their gifts in the affairs and structures of the church. The retiring pastor can now sit, enjoy and be fed by worship without feeling s/he has to manage everything. They can also be friend and support to her/his new pastor.

If they stay in the same community there is no rule that says the family must give up its present church membership. If they retain membership where they have been, the family's closest friends are often in that congregation, however the family's relationship with the congregation changes. Their friends need to be free to develop a relationship to the new pastor and his/her spouse just as they did when the retiring couple first came to the church.

Any continuing relationship needs to be extremely judicious and restrained in conversation about the church in any manner, from which the pastor retired. A successful return by the family (including the former pastor) to the former church requires:

1. full and open discussion and agreement of the installed pastor regarding the return
2. a self-confident and non-threatened new pastor
3. the former pastor must genuinely be willing to switch from being the shepherd to taking her/his place as one of the flock
4. the judicious and tactful refusal of the former pastor and family to become involved in any discussion of the church's policies or problems.

While adult children might remain in the congregation, they too will need restraint and grace as they relate to the new leadership and the changes s/he will bring about. If they hold office in the church they must be ready to be supportive and accepting of the new pastor. If they feel they must stay on to protect their parent's legacy and program, they should consider resigning.

The family should be preparing for this radical change in its life well in advance of the retirement.

The Presbytery and Commission on Ministry should give sufficient and clear guidance and support to the retiring pastor and family or the session and congregation at this point in their pilgrimage.

WHAT IS TO BE DONE

In the midst of these complex dynamics the purpose of the Presbytery, as it provides pastoral care and guidance to the congregation, the session, the retiring pastor and family, should be to enable the health and future vitality of each entity. The COM recognizes that at the retirement from pastoral ministries - and the longer they are, the more this is likely to be true - both special opportunities and special dangers are present.

Sometimes pastors and their families choose to remain in the community and in the congregation. We can cite historical instances where that has been done to the great strengthening of the future pastor, that pastor's family, to the retiring pastor and family as well as to the congregation at large. We can also cite historical instances where continuation in the community has had disastrous results.

It is the COM's hope to assist retiring ministers, their spouses and families who choose to move out of the community and those who choose to remain in it. While different strategies must be employed in the different decisions and circumstances, our goal is always to promote spiritual health and wholeness in the likeness of Jesus Christ for all concerned.

The Session and the Congregation, after a proper farewell to the pastor and her/his family, needs to definitively close that chapter of its life and move on into the future into which God wants to lead them. It is essential to the health of the congregation. Everything should be done to enable the people to move into that future and build a relationship of trust and confidence in a new pastor. The session and presbytery bear responsibility for nurturing the congregation to that end. A key step in this process is the hiring of a qualified pastor to serve during this time of transition.

The Retiring Pastor faces one of the biggest challenges of her/his ministry - to help the congregation end its relationship to and dependence upon her/him, and to do nothing that will slow or interfere with the congregation's development of its new direction in the transition period and its loyalty to a new pastor. S/he must do this at the time when s/he is facing the development of a whole new style of life, sense of call and new sources of self-esteem and fulfillment.

The Pastor's Family are a part of the retirement process and experience and should be included in COM'S pre-retirement conferences that will explore the most meaningful ways by which the family can understand the dynamics of the new situation and adjustment for them. If the retiring pastor and family stay in the community, then neighboring pastors need to be alerted to the needs of these persons and held accountable for extending them hospitality and support.

The Presbytery and the Retired Pastor The retired pastor and family need the continuing pastoral care of the presbytery. The COM asks minister members to contact the COM chair or Executive Presbyter when the minister begins to plan for retirement, even if that event is still some years in the future. In every anticipated retirement, the COM shall strive to guide the minister through the retirement process and to continue in a pastoral relationship after retirement. COM shall also seek to provide pastoral care and guidance to the minister's spouse and family, as appropriate.

In addition to enabling the processes, which have been suggested above, the Committee on Ministry should:

1. if the retiree and family are moving away, alert the new presbytery of membership and particular churches there to the new family's need for welcome and pastoral care.
2. if the retiree and family are staying in the Presbytery, see that the presbytery makes use of their skills and energy in presbytery committees and activities. These should help in alleviating the subtle loss of "status" that a minister feels in presbytery when s/he is no longer pastor of a church.

FOR ACTION BY THE PRESBYTERY

The Presbytery through its Commission on Ministry is responsible, when a minister is retiring, for the guidance and pastoral care of the minister and her/his family, of the session and the congregation.

The Pastor and Family

The COM will meet and counsel with the pastor and her/his family well in advance of the retirement concerning:

1. the personal dynamics of the transition to retirement for the pastor and her/his family.
2. their relationship to the former congregation, its life and its leadership, and their role in any other church in the community, if the pastor and family are to remain in the same community
3. the "Retirement Agreement" (see attached) which will be developed between the retiring pastor and the session.

The COM will have responsibility for the continuing pastoral care for all pastors and their families, or surviving spouse, in the presbytery.

Educating the Session

The Executive Presbyter and/or COM will meet with the session to explain its critical role in the maintenance of a vital and healthy ministry in and through the church, understanding that the loss of a pastor can be a traumatic event for a congregation as well as the pastor.

The session is responsible for the spiritual and administrative life of the individual church. As such the session has a very important role in the retirement of a pastor, the successful transition of the church in the period and the calling and installation of the new pastor. It is important that the session lead the congregation in saying "good-bye" appropriately to the retiring pastor and in moving toward the next chapter in pastoral leadership.

The following is intended to help a session fulfill its responsibilities with integrity as it seeks to follow and serve Christ. The Session will:

1. Initially receive the pastor's notice of the intent to retire.
2. Notify the Executive Presbyter of the presbytery and arrange for her/him to meet with the church and pastor.
3. Call a congregational meeting to dissolve the relationship between the church and the pastor. The Clerk of Session shall notify the Commission on Ministry through the Stated Clerk, of the congregation's action and request that the Committee on Ministry concur.
4. Get from presbytery and the COM copies of this paper which delineates how a retired pastor is to relate to her/his former congregation.
5. Inform the congregation that the retiring pastor, once retired, is not to be involved in any further ministry with church members, e.g. services such as baptism, weddings, funerals and also other functions including, but not limited to pastoral care. The session will explain to the congregation why this break is necessary as it is often difficult for members to understand and accept the loss of the pastor. This should be both in the form of a letter to the congregation and through the newsletter, signed by both the Clerk of Session and the retiring pastor. On the rare occasion when such participation is desirable, the invitation with session approval must come through the current pastor or interim moderator.
6. Develop a Retirement Agreement with the retiring pastor (sample attached) and have the agreement approved by session. A copy of this agreement will be included in the minutes of the next session meeting and a copy signed by Clerk of Session sent to COM for its information and records.
7. Ensure appropriate celebration gifts are arranged for the retiring pastor and family.
8. Develop a plan for on going pastoral ministry once the installed pastor retires. This includes pulpit supply, pastoral care coverage, etc., until a pastor is in place for the time of transition.
9. The session, after two years of the departure of the retiring pastor, and after approval of the Commission on Ministry, may consider bestowing the title of "Pastor Emeritus/Emerita" if appropriate. The title is honorific, in appreciation of past service, carrying no ministerial or pastoral authority or rights with the congregation.

Educating the Congregation

The Executive Presbyter and/or COM will meet with the session to explain its critical role in the maintenance of a vital and healthy ministry in and through the church, understanding that the loss of a pastor can be a traumatic event for a congregation as well as the pastor.

The session is responsible for the spiritual and administrative life of the individual church. As such the session has a very important role in the retirement of a pastor, the successful transition of the church in the interim period and the calling and installation of the new pastor. It is important that the session lead

the congregation in saying "good-bye" appropriately to the retiring pastor and in moving toward the next chapter in pastoral leadership.

The following is intended to help a session fulfill its responsibilities with integrity as it seeks to follow and serve Christ. The session will devise means to help the congregation:

- 1) Be aware of and follow the policies set forth by presbytery and the session of the church in regard to the retirement of a pastor and any future relationship of hers/his with the church.
- 2) Develop a method of grieving for the pastor:
 - a) Provide opportunities to express themselves individually, in small groups through such methods as teas, coffees, parish groups, prayer meetings, open forums and the like.
 - b) Allow members to share their feelings, as need be, to start to heal and move on.
 - c) Make arrangements for leadership of these groups as appropriate (e.g. COM, Session members, pastoral services during the time of transition, outside experts).
- 3) Begin to consider the future:
 - a) How is the health of the church?
 - b) What do you want for your church?
 - c) What do you want the mission of your church to be?
 - d) Where do you see your church in five years?
- 4) Use the transition period wisely and beneficially: analyze the past and present, and envision the future, using the resources of presbytery, demographics and congregation. Support the Vision Setting Process as it gathers information for use by the Pulpit Nominating Committee.
- 5) Understand the session's special need of support as it leads the church during its search for transitional pastoral leadership and the coming of the new pastor.

Board of Pensions Information

Ministers (and other Benefits Plan lay-members) considering retirement are strongly encouraged to attend one of the free Pre-retirement Planning seminars offered by the Board of Pensions of the Presbyterian Church USA. This two-day seminar covers many of the important issues of transitioning to retirement. It is a holistic approach to retirement planning which covers not only financial issues of retiring, but also healthcare, relationships, where to live/housing options, what to do with your time, and the various steps needed to formally retire under terms of the Benefits Plan. You may take this seminar as many times as you wish starting at age 50. You may attend any seminar regardless of where it is being offered. However, attending at least one Pre-retirement Planning seminar in the year prior to your actual retirement is highly recommended. For more information, contact the Education Department of the Board of Pensions at 800-773-7752 or e-mail education@pensions.org.

When a minister member leaves a call and remains within the community of service and when a minister member is part of a congregation experiencing pastoral transition, that minister should abide by the letter and spirit of the above, out of consideration for the new installed pastor.

RETIREMENT AGREEMENT *(revised October 13, 2016)*

We believe that God called us together as Pastor, Congregation, and Presbytery when the Presbytery of Carlisle installed The Reverend _____ as Pastor of _____.

We believe that God calls to new ministries, including those in retirement, that require the dissolution of pastoral relationships. Thus, it is appropriate that the Congregation of _____ dissolves the relationship between itself and The Reverend _____ on _____.

We believe that it is God's will that this church, and its new pastoral leadership need to be free to move forward in Christ's ministry, able to establish new bonds and experience new ministry and styles.

We believe that the reign of God among us is diminished if the parties above were to give any time to making or listening to uncomplimentary or critical comments or comparisons of pastoral leadership.

Therefore: In order to honor God's call, will and reign, we establish this Agreement to assist each other in observing the following commitments and agreements:

- A. Prior to leaving, the retiring pastor, together with the session, will send a letter to the congregation, and have it published in the church newsletter, stating that s/he will be retiring and thus will no longer be the congregation's pastor. The letter will request that the congregation not ask the retiring pastor to officiate at any services after the date of effective dissolution.
- B. After the dissolution of the relationship, The Reverend _____ shall not be involved in any way in his/her previous church nor be asked or accept an invitation to officiate at any Baptism, Wedding or Funeral involving a member of the church, including their relatives and friends from the time the pastor retires until two years after the installation of the new pastor. Following such a two year period of separation, s/he shall only accept such invitations as may be extended by the Moderator after direct discussion between the retired pastor and Moderator of the Session.
- C. The session and members of the congregation agree that during the final month of the pastor's ministry that the officers and members of the church will carry as much of the administrative responsibility as possible to enable the pastor to prepare her/himself for leaving (ie: saying good-bye, removing personal files, books, effects from the church buildings).
- D. The Pastor agrees that by the dissolution date above, all funds, keys, papers and property belonging to the church will be transferred to the proper officers or staff.

Retiring Pastor

Clerk of Session

1/08/2009 Given the Guidelines recently adopted by presbytery, COM voted to establish a policy of granting Honorable Retirement to a Minister Member, only when COM has received a "Retirement Agreement" signed by both the retiring minister and clerk of session of the particular church.

Revised 11/10/2016