



Exiting a Congregation Well

Guidelines for Clergy

Adapted from the Diocese of Central New York, which included contributions by the Rev. Carrie Schofield-Broadbent, the Rev. Canon Thomas R. Orso, the Rev. Thad Bennett, and countless other Transition Ministers. We are pleased to share this adapted version for use in the Diocese of Arizona.

A good beginning depends on a good ending. How your tenure ends at your congregation will make a deep impression on your members' memories as the rest of your ministry. 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 have collected wisdom and good practices about important moments in the life of every ordained person, a moment of celebration, ending, beginning, death and resurrection.

Mindset

- Be intentional about your remaining time.
- Maintain a non-anxious presence.
- The priest needs to remain genuine and authentic throughout the departure process.
- Remain conscientious about assignments until the end (but don't try to do everything!). Determine which decisions should be deferred to the next leader.
- Be open to having personal time with others where the members can express their feelings.
- In getting affairs in order, remember to wrap up your ministry and not the congregation's ministry. Develop a plan for closing out your ministry and allow the congregation's ministry to continue and your successor's ministry to flourish.
- Realize you are modeling closure for others.
- Remember, the congregation will be working with the Bishop, Canon to the Ordinary, and the Diocese to find your successor. If your relationship or the congregation's relationship with the Diocese or Bishop is complicated somehow, this is a time to seek healing, forgiveness, and a new start.

Technical Essentials

- Inform the Bishop and the Canon to the Ordinary in writing about your plan to leave and the date of your last worship service.
- Notify the wardens in person, and with the wardens, notify the Vestry of your decision to leave.
- The 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.
- Pray and spend some time with whatever spiritual practice keeps you centered and focused upon God and the fact that Jesus is walking this journey with you.
- 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.
- With the Vestry, clarify what is church property and what is the property of the priest (computer, books, curriculum, furnishings, vestments, etc.). If church funds were used to pay for an item, it belongs to the church. If the item was bought with the personal funds of the priest, then it belongs to the priest. If the priest would like to gift the items to the parish or the parish to the priest, please note those in vestry minutes.
- Notify the Church Pension Fund, securing the proper forms, if you are retiring. The Bishop's signed approval is required for retirement. The Church Pension Fund needs at least three months' notice to get retirement paperwork in order.
- Plan a ritual ending of your pastoral relationship within the context of worship. We recommend using or adapting the rite in the *Book of Occasional Services* on page 319
- Plan an ending with parish organizations and staff.
- You are not entitled to unused sabbatical time/funds.

Communicating Your Decision

- Be clear and straightforward about your reasons for leaving.
- People often carry a lot of sadness, confusion, and sometimes guilt about a priest's departure; make sure you clarify your real reasons.
- 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 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; and explain the guidelines for relating after you leave (below). If you have questions about those guidelines, clarify them with the Canon to the Ordinary or the Bishop.
 - It no longer will be your role to officiate at their baptisms, weddings, and funerals.
 - You will come back only after some time has passed, 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 to the Ordinary and the Wardens and/or vestry and parish leaders. If needed, schedule private exit conversations 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 are clear about all financial commitments to each other and how to handle whatever vacation time remains.
- Thank the staff publically and privately (Update job descriptions for paid staff).
- Pray with and for the staff.
- Make yourself available for members to say goodbye, including visiting the homebound members.
- Meet privately with individuals with whom there may have been tension or conflict. Pray with them.
- 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.

Organizing for Your Successor

- Review with the Wardens and Vestry their leadership responsibilities for property, finance, and administration during the transition.
- Identify those in hospitals, nursing homes, assisted living facilities, and homebound, 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. Make sure to note any specifics the new pastor might need. (Use the side door, call first, etc.)
- Note significant pastoral concerns such as premarital counseling, pregnancies, divorces in process, terminally ill, and the bereaved, remembering to maintain the confidentiality of pastorally sensitive matters. (Including any Safe Church concerns) This information should be left in writing for the interim priest and delivered by the senior warden or the appropriate Canon.
- Note the 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 for the Vestry and Interim about your congregation's participation in community or ecumenical services, as well as their expectations about preaching and hosting future events.
- Make sure all parish lists and registers are up to date and complete.
- Balance the discretionary fund and turn it over to the Wardens.

- Make a list of any special funds, 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. Electronic files are encouraged.
- Identify the location of the safe and who knows the combination.
- Identify the location of the bank deposit box and who has keys.
- Preserve historical documents.
- Clean out personal files. Keep what you need and carefully dispose of the rest.
- Arrange personnel files. Make sure to include copies of job descriptions and letters of agreement.
- Prepare a file of service leaflets for the past three years. (Electronic files are encouraged.)
- Prepare a file of Eucharistic minister and visitor certificates, lists of current altar guild members, ushers, acolytes, and servers with contact information. Electronic files are encouraged. 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. Dispose of clutter that has accumulated and is no longer in use.
- Make a list of web addresses and passwords that pertain to the church.
- If another person will use your email address, clear out the account.
- 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 all your church keys, clearly tagged.
- Establish a date-specific for moving out of church-provided housing.
- Encourage and emphasize hospitality for welcoming new clergy and their loved ones.
- Let people say goodbye, thank you, and give you their blessing. Accept them!
- Assist wardens in making arrangements for temporary emergency pastoral coverage for the time immediately following your departure.
- If it needs to be done, do it! (Don't leave anything for the next priest. Too many arriving priests are sunk by things left undone).

Personal Tasks:

- Say "Thank you" as often as you can.
- Be straightforward within significant relationships in the parish about deeper feelings, disappointments, frustrations, hopes, joys.
- Let go of old grudges, not by irresponsible "dumping," but through a lived commitment to resolve and reconcile. At the same time, be open to the rejection of your overtures.
- Review your total relationship with the congregation.
- Idea: publish a schedule of when you'll be in the office packing up so that people can drop in for goodbyes.

Relating After You Leave

- Arrange for change of address and mail forwarding. Notify those outside the parish of your new email address. If appropriate, leave a permanent "away message" indicating your work email account is no longer in use.
- After your last day, do not return to the office to check mail, email, or phone messages.
- **In all cases, the responsibility belongs to clergy leaving to make clear that the pastoral relationship has ended. Know these guidelines and convey them to the Vestry and congregation verbally and in writing.**
- **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 clergy 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 for you (and your family) 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 parish's worship, finances, property, and administration.
- 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.