



THE EPISCOPAL DIOCESE OF MISSOURI

CLERGY LEAVE-TAKING

THE REV. CANON DORIS WESTFALL
CANON TO THE ORDINARY
DWESTFALL@DIOCESEMO.ORG

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 telling them that you are ending your pastoral relationship with the parish 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 their writing a letter to the congregation that outlines your plan for leaving and assuring them that the congregation 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 be withdrawing from social interaction and other parts of the "life of the congregation," including social media so the congregation can move forward; and
 - you will be absent from the life of the congregation for at least one year after the arrival of your successor, after which you may come back only at the invitation of your successors (interim and next vicar/rector) 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 transition officer and a mutual review of ministry with the vestry and parish leaders.

- 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 and 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

- Prepare a written and confidential “welcome” document for your successor.
- Review the parish register to make sure it is an accurate record of your ministry.
- Train wardens and vestry in 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. (Please leave a “normal” amount of money in the fund.)
- List any special funds, including scholarships and other financial commitments, their purpose, use and signatories.
- Prepare a file of audits, parochial reports, annual reports, copies of budgets for three years and by-laws.
- 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 certificate, list 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 for 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 take out....
- Create 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 bless you on your way.
- 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.

HELP YOUR CONGREGATION HAVE A STRONG RELATIONSHIP WITH THEIR NEXT PRIEST/DEACON

- 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.
- If you continue to live in the community, do all in your power to allow the next priest to minister as if you did not live there.
- 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.
- Be clear that your spouse or partner (and your children) will be leaving and no longer involved in the life of the congregation.
- Remove yourself from all pastoral conversations with your former parishioners via social media: Facebook, Twitter, LinkedIn, etc.
- When it comes to parishioners and members of the church staff, every relationship you have is fundamentally pastoral. Parishioners' feelings of "friendship" toward you are entangled with their feelings for you as their priest and can be easily confused. It is your responsibility to know where the appropriate boundary is and to maintain it.
- Be cordial with parishioners and church staff should you see them around town.
- Also be clear that you must distance yourself from parishioners so they might bond with their new priest.
- The best practice is to stop all social engagement with parishioners and church staff for at least one year after the arrival of your successor.
- When you are aware that a boundary is unclear, contact the bishop or canon for advice.

RESOURCES

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 CPG.org.

The Search Manual of the Episcopal Diocese of New York available at diocesenyc.org.
Created by the Rev. Canon Thomas Orso of the Episcopal Diocese of New York.

Thanks to the Episcopal Diocese of North Carolina for pioneering this resource.