

FINISHING WELL

Continuing to Make a Difference



*Walking with pastors during their transition
from ministry to retirement and beyond*



Servant Solutions
YOUR RETIREMENT & FINANCIAL PLANNING PARTNER



I hope by the time you have read this document you will be as excited as I am that such a thought-provoking, helpful guide is being made available to all who are involved in ministry in the Church of God. Though I am way past what is generally considered retirement age, I am thrilled to know that such a stimulating and helpful document is available to you.

Let me urge you to read it, process it, use it in whatever ways it will

benefit you. Life is a journey and you now possess a resource that can assist you in a very important phase of that journey—retirement and beyond.

You get to choose how you will engage in preparation for what can be some of the most spiritually productive days of your life. It is a time to reflect, to allow God to help you make sense of the journey, to gain wisdom and richness as you harvest the deep meanings of your failures and your successes. Don't miss out on all that this phase of life can bring to you as you, in openness and honesty, allow God to stretch you, grow you, use you, bless you and the people who are a part of your life.

Though I am way past what is generally considered retirement age, I am thrilled to know that such a stimulating and helpful document is available to you.

This is a resource—not a map that must be followed in detail or it will become meaningless. Be creative as you use it. Ask God to lead you. I believe God wants us, His children, to not run from the challenges but to find joy and “becoming” in the midst of the challenges. God is at work—in you—in your ministry—in the Church of God Movement—in the world—and He is always working for good. I believe if you utilize the ***Finishing Well: Continuing to Make a Difference*** resource it may well be one of the important ways God works for good in your life. May it be so.

Ann Smith

Finishing Well: Continuing to Make a difference

is a training tool originally developed by the Sustaining Pastoral Excellence initiative of the Christian Reformed Church in North America
2850 Kalamazoo Ave SE, Grand Rapids, MI 49560 and adapted with permission.

Servant Solutions extends its deep appreciation for making this valuable resource available.

TABLE OF CONTENTS



| | |
|---|----|
| How To Use This Training Tool | 4 |
| Introduction | 5 |
| Chapter 1: Concluding Full-Time Ministry | 6 |
| Where Will Your Retirement Dollars Come From? | 9 |
| Chapter 2: Making the Transition | 12 |
| Chapter 3: The Retirement Years | 21 |
| Chapter 4: So Your Pastor Will Retire | 28 |
| Appendix | 32 |
| Ministerial Transition Guideline | 36 |
| Exit Checklist | 38 |
| Covenant of Closure | 39 |

HOW TO USE THIS TRAINING TOOL



This booklet is a training tool for use by pastors and their spouses as they plan for and enter retirement. It can be used in a variety of ways:

- **As a guide for a pastor and spouse**
- **As a guide for a peer group of pastors, including spouses, at key junctures**
- **As a tool for church boards (especially Chapter 4) to explore ways in which the pastor, board, and congregation can be part of planning for the pastor's end of ministry and retirement**
- **As a resource for personal growth**

At the end of each chapter there is a section of reflections and a list of possible next steps. These are designed to help those who use this book to make the process of retirement planning their own. Again, depending on the way this training tool is used, as a couple or a peer group, this format encourages different options for addressing retirement planning.

The final chapter, "So Your Pastor Will Retire," was written with the knowledge that a pastor's retirement not only affects the pastor and pastor's spouse but also the congregation where the pastor is serving. If pastor, spouse, and congregation are part of the retirement process, it can facilitate a time of celebrating the years together and planning for the future of all involved.

This resource was adapted for use by Servant Solutions in serving ministers and missionaries of the Church of God and other church congregations participating in the Servant Solutions Retirement Plan.



Servant Solutions
YOUR RETIREMENT & FINANCIAL PLANNING PARTNER

INTRODUCTION



Everyone finds endings difficult, so your own style is not a sign that you have some “problem” that others don’t have...

“However you have learned to deal with them, endings are the first phase of transition. The second phase is a time of lostness and emptiness before ‘life’ resumes an intelligible pattern and direction, while the third phase is beginning anew.”

Transitions: Making Sense of Life’s Changes by William Bridges

As you plan for retirement, this training tool will provide principles and resources to help you finish well and continue to make a difference.

First, planning for the final years of ministry and retirement happens best in some form of community. This definitely includes the pastor’s spouse whose concerns may or may not differ from the pastor’s. The process

It is important to take the time and effort to go through the process of ending well.

is an opportunity to reveal any concerns and work toward consensus. Conversations with other pastors and pastor couples can be beneficial. Through such discussions, you can gain greater insight, compare your concerns, and encourage one another.

Second, one of the key components of moving into retirement is being intentional about the final years of ministry. As William Bridges notes in the above quote, *endings are the first phase*

of transition. It is important to take the time and effort to go through the process of ending well. This includes farewells, reminiscences, and working with a planning committee and/or congregation to have a clear trajectory for the final phase of ministry. This is often the most challenging and rewarding task of the transition from full-time ministry to retirement.

Finally, the practical issues of government programs (such as Social Security and Medicare in the United States and the Canada Pension Plan and Old Age Security in Canada), retirement plans, and health insurance programs are often not understood and thus cause much anxiety. We encourage you to combat that anxiety by gathering information from sources available and begin to plan accordingly.

CHAPTER 1: Concluding Full-Time Ministry: Thinking of Retirement



You may not remember when it happened, but there was that first time when it entered your mind: *I am moving closer to retirement*. You may have dismissed the thought, but the months moved on... another year. Then came the date when you and your spouse mentioned the word *retirement*, and you began to talk about it now and then. This training tool is meant to accompany you through:

1. the steps of thinking and planning for retirement from full-time ministry
2. the transition period that is concluded by your actual farewell
3. life in retirement

In addition, a chapter is added for the benefit of your church board because its members need to be part of the process.

A note to those of you who are married: As you take these steps, be sure that you and your spouse function as partners. So many decisions need to be made that will affect your retirement years; making them together will assure a common ownership and will add to your happiness. Because it is so difficult, the first thing to discuss and decide is the date of retirement.

The Need for Planning

Planning does not just happen. You must make a conscious decision to do it. You and your spouse have to commit yourselves to give this your best attention and effort. You will never regret that you did. Planning has many benefits. It will help you to conclude the ministry well, which will not only benefit your congregation spiritually, but it will also add to the quality of the memories you have of your ministry. These good memories, in turn, contribute to good health.

Take enough time for the several steps that go into the important process of preparing for your retirement. How much time is enough? Several years; three is minimum, and five might even be better. You and your congregation will not regret that you took that much time.

An ample planning season has at least three important advantages:

1. It will have a very beneficial effect on the quality of the last few years of your ministry.
2. It will help you and your congregation set the right course for the future.
3. It will enable you and your church to think of the remaining years of your ministry as a Term Call. A Term Call makes the length of your remaining time with the congregation clearly known and understood. You and your congregation are thus in a favorable position to renegotiate the various components of your actual ministry during that time. More about that will be given in the next sections.

Reflecting on Your Ministry

Your having made the decision to retire from active ministry begins a time in your life when you should sit back and do some thinking. You may consider matters such as:

- what your ministry has been like all these years
- habits and patterns you have developed
- places you have been
- some of your earlier ideals were that perhaps were not fully realized
- interests you had that perhaps were not fully pursued
- ministry areas where you excelled
- studies you engaged in with good results for teaching and preaching
- reading habits you developed
- aspects of your ministry that proved to be particularly rewarding
- determining the people and experiences that had the most impact on your life and ministry

By all means, seek the input of your spouse and perhaps your children. You may even wish to seek the input of trusted colleagues who witnessed parts of your ministry. Write down what you find; discuss them together; do not let negative observations get you down. They also have great value. Everything that has been or is a part of life is the raw material for growth. Reviewing one's life and career may lead to promising results. Some of your conclusions may still enrich the remaining years of your ministry, and they may help you in setting the direction for your retirement years.

The Concluding Years: Shaping Your Ministry

It is important that your current church board becomes a partner with you in considering the direction of the remaining years of your pastorate. The implications of a term call are very apropos here. How can this clearly delineated period of your ministry become maximized to the benefit of both you and your church? Together you may outline the needs of the church at this time in its history. How can your gifts, skills, and interests be put to the best possible use? You may agree to assume some new ministry obligations and discontinue others. Your board may then want to recruit qualified volunteers to round out the overall ministry program.

You and your board should appoint a small planning committee consisting of perhaps three or four persons, and together you can set goals for the remaining years and produce a blueprint that your board and the congregation may consider to be profitable.

Together you may review the entire program of the church, adding some parts, dropping others, and perhaps modifying still others. Sharing and discussing this with the congregation in a town hall meeting may invigorate church life. In shaping the final years of your full-time ministry it is important to reflect on every aspect of your ministry work.

Your Health

Even under the best of circumstances, this last stretch of your ministry will be a demanding one. This may be a good juncture in your life to strive for optimum health. Remember, you don't have to be sick to get better.

Is your physical health as good as it can be? You would do well to arrange with your physician to have a complete physical examination. Discuss your lifestyle with him or her and see where improvements can be made. A good diet and a regimen of physical exercise can be of great help in your feeling well, and that, in turn, will enable you to work with joy and energy.

Of great importance is your spiritual health. The ministry is not without its spiritual pitfalls. Your Bible reading has often been geared to finding material on which to preach. You have involuntarily set aside some of the finest passages of the Bible to read at sickbeds or to those who are sorrowing.

You may now intentionally embark on reading the Bible, or other devotional literature, for no other reason than to nurture your soul. You have said many prayers in your capacity as pastor. Now concentrate on personal prayers.

Closely linked to your physical and spiritual health is your mental and emotional health. Health that is not up to par will affect the ministry negatively, producing a feeling of listlessness and tiredness to the degree that problems remain unaddressed. You may even feel distant from the congregation. If negative emotions such as depression, sadness, fear, or anger frequently trouble you, you need to discover their causes. You may need to talk about such feelings and how they affect you and your work with a trained counselor. A lack of acceptable performance will probably create feelings of guilt that in turn become their own obstacles to spiritual replenishment. You would do well to register for a spiritual retreat exclusively for your own benefit. Let a spiritual director help you recapture what once were strong spiritual patterns in your life. Commit yourself to a prayer and Bible reading regimen that will replenish your spiritual reservoirs.

Your spouse should be a part of all your planning efforts. If you have not already made a decision regarding housing, please give it much thought. There are a number of possibilities to be considered, and Servant Solutions can advise you.

RETIREMENT INCOME DIVERSIFICATION

Where will your retirement dollars come from?

We are blessed to live in a day and age where average life expectancy is longer than ever. However, the added years mean that you will need to plan for additional living expenses. As you consider where your retirement dollars will come from, you'll look at how much you have, how much you'll need, consider opportunities for your money to grow, all while being smart about taxes.

Diversification is the golden rule of investment, and it becomes critical upon retirement. For most retirees, the primary sources of retirement income are **Social Security**, **Retirement Savings**, **Personal Savings (and Investments)** and **Earnings from continued employment**. Creating and utilizing multiple retirement income streams will put you in a better position to live your retirement dreams.



- The Social Security Administration states that these benefits should cover no more than 40% of the income needed in retirement.
- Your account with us at Servant Solutions.
- Any additional income streams including those that fluctuate with the market or sales (i.e. royalties)
- It is wonderful to observe persons who have given a career to the Lord's work find a new avenue for continued ministry.

(Note: percentage examples are for educational purposes only and should not be relied upon for any other use.)

John and Mary, both in their early sixties, and thinking now and then of the reality of retirement, discussed one day what concrete steps they could take toward guarding their health. They agreed to engage in the following exercise:

- ◆ pinpoint their present health inadequacies
- ◆ explore ways of dealing with them
- ◆ outline steps toward health improvement such as diet and exercise
- ◆ read and rewrite personal comments and insights daily for one week
- ◆ exchange written reflection, read, and ponder
- ◆ sit down for a discussion and agree on a healthy lifestyle for themselves
- ◆ pledge to discuss health issues periodically and review lifestyle

Your Finances

WHERE TO LIVE - SOME FACTORS TO CONSIDER

One great benefit of planning your retirement four or five years before your final farewell is that you increase the time to do additional financial planning and management. It is crucial that you have clear and accurate information about your current financial situation and your goals for retirement needs.

It might be helpful to consult Servant Solutions' Certified Financial Planner (800-844-8983) and allow him to see a clear overview of your situation.

LIVE FREE, a seven-step guide designed to strengthen personal finances and budgeting, is available at servantsolutions.org

Place: hominess

Continuity: balancing the familiar and the novel

Comfort: adequate facilities and services

Climate: average temperatures, humidity

Affordability: fits the budget

Proximity: near enough to family and friends

Transportation: proximity to public facilities

Relationships: compatible people

Medical: adequate for personal needs

Work after retirement: outlets for your skills and interests

Church: edifying worship and opportunities for participation

Culture: artistic and intellectual needs

Variety: choice; intergenerational needs

Keeping fit: opportunities for sport and exercises

Staying put: right fit of community and church

REFLECTIONS

1. When do you plan to retire? What steps are you taking to prepare for retirement?
2. Consider the length of service in your present church. Will that have a bearing on how long you will want the concluding chapter in this church to be?
3. Do you have ministry tasks that you would like other leaders in the church to take over from you? Do you have certain professional strengths that are presently not put to good use? Which facets of your ministry have you found most rewarding?

REFLECTIONS (Continued)

4. What significant changes do you anticipate as a result of retiring from work?
5. To what extent has your ministry become your identity? How can the transition process contribute to a better understanding of who you really are?
6. What are your spouse's observations regarding your physical, emotional, and spiritual health?
7. How do you feel about your financial management during the years of ministry? Do you have regrets? How does your spouse feel?
8. What is your spouse's vision of a happy retirement?
9. What is your vision of a happy retirement?
10. What is your passion for life?
11. What are the things you've been unable to do in the past that you look forward to in retirement? In what areas would you like to continue to grow and learn in retirement?
12. What expertise do you bring to others in your retirement?

NEXT STEPS

1. Sketch a broad timetable of meetings you need to have with your board and planning committee to implement the suggestions in this chapter that you have found to be practical.
2. Make a list of things that you think need your attention before your retirement begins.
3. Describe significant changes in your life such as taking a call to another church, relocating to another city, family changes, sabbaticals, and so forth. Identify the three-step process: ending one stage, the actual transition period, and welcoming a new situation. How did those changes affect you? Write down how those experiences may help you in preparing for the upcoming changes connected with your retirement.
4. Visit with a retired couple and discuss the implications of retirement transitions. What procedures did they find helpful or difficult? You may also consult with other pastor couples whose retirement is close at hand.
5. Attend a conference that focuses on issues that are unique to the concluding years of active ministry.
6. It is not too early to seek out a financial planner who will help you to clarify your financial picture for the future. Give us a call at Servant Solutions (800-844-8983) to talk to our on-staff Certified Financial Planner. This valuable service is provided free to all Servant Solutions participants.

CHAPTER 2: Making the Transition



You have gone through the important process of deciding to retire from the ministry. That was a huge step! It has taken much careful thought, serious discussion with your spouse and others, and heartfelt prayer before the Lord. You, together with others, are now ready to implement that decision. This chapter is meant to accompany you in imagining what your retirement may look like.

Most of the suggestions spelled out in Chapter 1 hold also for this period. However, now they are a bit more pressing. The calendar does not lie. Your exit date will soon be here. Here are some realities that you may come to face as you think of closing one chapter of life and anticipate opening another:

First, you will have moments of fear. Your working years sped by all too quickly. None of us comes to terms with our mortality without some struggle. You may find some of the retirement procedures scary. Tending to your spiritual health is now more important than ever. You will also profit from carefully planning the necessary steps toward retirement.

Second, it will occur to you now and then that you will probably not be present in your church to witness the fruits of your last chapter of ministry. You will be human enough to be tempted to take it a bit easier from now to the finish line. It takes intentional discipline to maintain high standards for the remaining season of ministry. You will not regret it. Only by finishing strong can you ***finish well***.

Third, you may find that the concluding months in your church are more demanding than you would ever have imagined. Roy M. Oswald of the Alban Institute gave encouraging advice in his book, *Running Through the Thistles*. Children on their way to school availed themselves to a great shortcut but at the price of traversing a swath of prickly thistles. The best way to do it was to be brave and run straight through it. You will have to go through stages of the retirement process that you may find painful. Face them head-on without undue delay. You may wish to consult the section on maintaining your physical, spiritual, and emotional health in Chapter 1 once more. Careful planning will prove to be very profitable in this respect, too.

The Shape of Your Last Year

In Chapter 1, we discussed briefly how you might best shape the ministry during your concluding years. Now that actual retirement is only one year or less away, this concern causes more pressure. A few additional comments may be helpful. Typically, you will continue to do the regular ministerial tasks: preaching, teaching, pastoral work, weddings and funerals, and attending necessary meetings. This is a good time for you and the board to consider if there are certain areas they would like you to emphasize in your preaching. Examples of areas of emphasis are: greater congregational unity, stronger lay leadership, affirmation of what the church has accomplished, a vision for community ministry, and so forth.

In addition to certain emphases in preaching, you may ask the board whether they can think of an area of church life in which you could give increased guidance. They may mention concerns such as ministry to young families, to single parents, and to youth; community outreach; and the administrative and organizational structure of the church, among others.

In Chapter 1 it was also mentioned that you and your board may consider discontinuing certain activities and assuming others that are more in keeping with your interests and gifts. Is the climate suitable to pursue this? Now may also be the time for volunteers to be appointed to make this possible. Such a review might lead to your dropping and modifying certain program details, adding others, and modifying still others. Finally, consider the possibility of planning a series of sermons that are not only designed to prepare the congregation for change but also to meet personal spiritual needs that you feel still prevail.

THE REALITY OF DIMINISHMENT

We ought to begin by acknowledging that physical diminishment in aging is real.

...With retirement there often comes a crisis of identity. We who have always been at the center of the life of the church, will no longer have the same kind of influence. A change in our role may look very appealing at times, but many of us will experience stepping back as a significant loss...

I am not saying that diminishment is all there is to aging. Nor am I saying that there are not many myths about the aging process that ought to be demolished. What I am saying is that for most of us there will be a gradual stripping away. We ought not to live in denial of the pain of these losses nor miss the chance to grieve them.

But more significantly, and I suppose paradoxically, we ought not to miss the chance to grow through them. The diminishments experienced in the process of aging can become the occasion for wonderful spiritual growth.

Here then is the wonderful principle: spiritual growth, our participation in the values and challenges and delights in the Kingdom, our relationship to God, are not circumstantial. These things of eternal significance are not negatively impacted by diminishment. In fact, paradoxically, these things of eternal significance actually may be aided by diminishment. When in the aging process things are stripped away in diminishment and loss, can't we find in that pain and grief a fresh focus on the treasure of Christ?

From: The Paradoxes on the Autumn Journey

Your goal should be to leave the church so that it will move forward after you retire rather than tread water or flounder. However, be careful that you do not fall into the trap of pushing your own agenda and that you do not tie the hands of your successor.

Closer to the date of your retirement your board should schedule exit interviews with you.

Expressing Gratitude, Clearing the Slate

Gratitude should be expressed sincerely. Remain true to yourself, your Lord, and your flock. You need to assess your relationship with the congregation. Do you have regrets for not having given the ministry your all or for not having availed yourself of promising opportunities? Ponder those regrets and then lay them before God in prayer and seek His forgiveness. Never let forgiven sins haunt you.

The farewell service is a suitable platform for thanking the congregation. Prepare these remarks carefully. Ask yourself:

Deep down what have these people come to mean to me?

What manner of loyalty did they show me?

In what ways did they respond to my ministry?

What acts of kindness did they show to me and my family?

How did they support me with their resources—both spiritually and materially?

What did they come to mean to me when I saw their uplifted faces week after week in the worship service?

How did they help me grow and develop?

You may wish to reflect on all of these precious realities in your remarks of gratitude to the congregation. Should you thank individual members to whom you owe much? Yes, but not in the worship service. See them privately, which will enable you to be specific. Do not hesitate to spell out the ways in which they blessed you. Express your appreciation. Assure them of your friendship. Trust them to be discreet with what you entrusted to them. Among them may be some who are not members of your congregation. Give this careful thought. Consult your spouse. You do not want to overlook anyone.

There may have been members in your congregation who, as far as you could see, opposed your ministry or who may have even wronged you. If you think that these offenses were serious, try to talk things over with them individually. Be honest, but also be charitable. Let it be apparent that you seek healing for broken relationships. Be quick to forgive even when confessions are not exuberant. Do not nurse your anger or hold grudges. Give assurances of your goodwill. **Be prepared to leave some imperfect situations and even**

unsolved problems in the hands of God. Remember, pastors who voice grudges in their farewell sermons invariably come to regret it.

Concluding Financial Arrangements

Now that the decision to retire has been made, there are some specific steps you need to take before you go from receiving a regular paycheck to receiving Social Security and retirement income checks from your Servant Solutions account. You will need to contact the Social Security office and the Servant Solutions office (800-844-8983) in order to familiarize yourself with the application processes.

Representatives at the Social Security office in your area will gladly explain the details of your projected income and the documents they require, such as birth certificates, military service records, and proof of citizenship. They will also provide you with a booklet containing the information you need. If your spouse is also retiring, you may wish to make those contacts together. Some of the paperwork involved in all this may be more time consuming than you had expected. You need to take all these steps with Social Security at least four months before your retirement date, and contact Servant Solutions a couple of months prior to your retirement date.

Pastors who have served all or part of their ministry years in Canada may follow similar patterns through local offices of Human Resources and Social Development (see their website for a local office: www.hrsdc.gc.ca/en/home.shtml or your local Canadian phone directory) to arrange for their Old Age Security (OAS) and Canada Pension Plan (CPP) benefits.

By this time, if you haven't already, you will probably want to consult Servant Solutions' Certified Financial Planner (800-844-8983). Do not underestimate the importance of this step. He can also inform you about tax matters, since retirement has important implications for your tax obligations for the years ahead. Assistance in determining the best way to utilize your savings and/or investment and life insurance(s) income is also available.

Some pastor couples have acquired long-term health care insurance. You may wish to research this along with rates for health insurance. The rates could be high, but benefits may be considerable.

Planning the Farewell Ceremonies

Two events loom prominently among those connected with your retirement: the farewell church service and the congregational and/or community farewell event. Undoubtedly you will play a key role in arranging the farewell church service. Plan it carefully. Arrange with the board to appoint a planning committee to assist you. You and the committee members will brainstorm as to which elements should be in the order of worship. They may delegate someone who will speak some fitting farewell words. Do not postpone writing your sermon for that special service. Musical contributions and worship elements also need to be planned carefully and well ahead of time.

Thinking of Your Successor

Your board (and even your congregation) may have given the matter of a successor a bit more attention than you have. Deep down, this may make you feel a bit sad; however, the reality is that someone will succeed you, and the board should take steps to set the search and call process in motion. Churches are less in a hurry to fill vacancies today than they were a generation ago, which is for the better.

Most congregations will have an interim minister to provide leadership during the transition months. That way, the congregation can take its time to adjust to your absence and to plan for its future. You should not seek to become part of the succession process, but you need not be totally indifferent toward it. If those in charge of the calling process ask you for information or advice, encourage them to contact Church of God Ministries for assistance. Avoid giving the impression that you are a leading participant in the process.

Your board may also use this time in your church's life to do some ministry planning and goal setting as a preparatory part of the calling process. Again, they may consult you, and you may have some good advice to offer. Be a very modest player in that process; do not influence it unduly. You may have accumulated several files that have facilitated your work in your current pastorate (see Exit Checklist). Much of their content may relate to your personal ministry activities. However, as you go through your files, you may come across information that may be useful to your successor (such as minutes of board and committee meetings and names of various officials in church life). You or your church may also have had helpful contacts with community leaders, or perhaps you had assumed duties in the broader community. Your successor may find it very helpful to inherit your records.

Ongoing Relationship with Your Present Church

During this last chapter of your ministry, you and your spouse will have come to a more or less tentative agreement concerning where you will attend church during your retirement years. Some church members may even carefully inquire about where you will be attending.

Basically, there are two possibilities. If you move some distance away, you will transfer to the church you wish to join there. If you stay in the area, you may wish to join a neighboring church if there is one nearby. It is not in the best interest of you and your spouse, the congregation, nor the next pastor to remain a member in your last church. The succeeding pastor may not always feel relaxed working in his or her predecessor's presence.

Whether or not you decide to stay, you may consider using a Covenant of Closure. In this document, you and the board would spell out the boundaries for yourself and the members. If you decide to stay, follow this safe guideline:

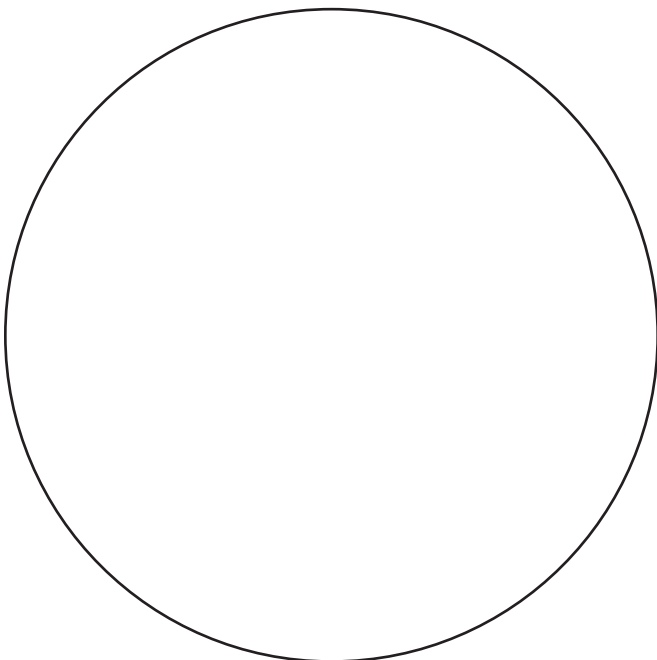
Be a faithful member and no more. You may preach when needed, but do not encourage being asked. Hospital visiting and pastoral care calls should be made by the elders and appointed "visitors", and only in case of need should you make your services available in these areas. Once your successor has taken over, avoid conducting funerals and weddings.

Journaling Exercises

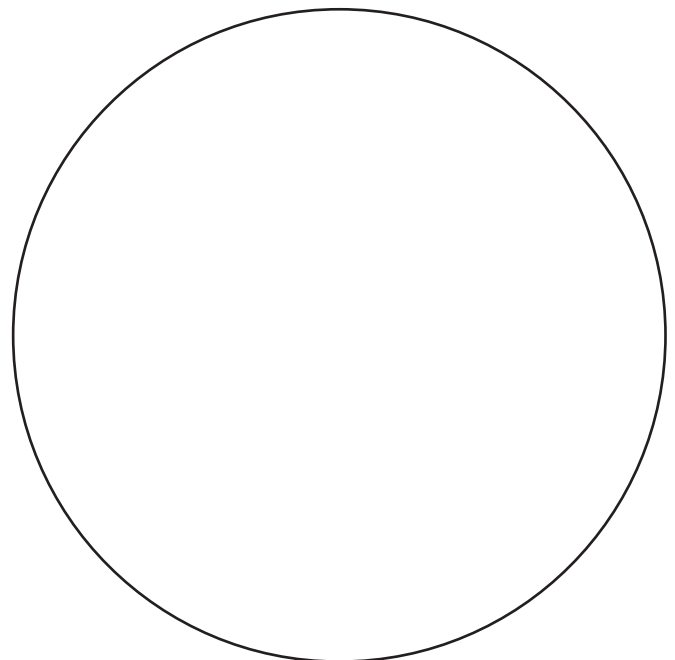
The rest of this chapter is meant to help you process your thoughts on retirement.

Balancing the use of time

Look at a typical week and divide up the amount of estimated time spent working, volunteering, playing, and learning in the circles below.



As it is today



As you would like it to be in retirement

1. Work: Gather your thoughts

Identify five activities (for pay or volunteering) you would enjoy doing in retirement.

- 1. _____ 4. _____
- 2. _____ 5. _____
- 3. _____ 6. _____

Which activities are related to your present work? How are they related?

- 1. _____ 4. _____
- 2. _____ 5. _____
- 3. _____ 6. _____

Which activities have nothing to do with what you do now?

- 1. _____ 4. _____
- 2. _____ 5. _____
- 3. _____ 6. _____

2. Play: Spending time

I would like to... _____

3. Learn: Investing time

I would like to know more about... _____

I would like to experience... _____

I would like to attend... _____

I would like to learn about... _____

Skills

What skills do I most enjoy using? (Put a check by those you would like to continue to use in retirement.)

- | | |
|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 6. _____ |

Who Are You in Retirement?

Imagine that you have been retired for two years and you are going to be introduced to a group of people who want to know what you do and what your interests are.

What makes you “you”? Write two or three sentences you would like used when you are introduced. (In this exercise you are not permitted to use the words: formerly, retired from, or spouse of.)

REFLECTIONS

1. Think back to the suggestions you made to the board in connection with your role in church life. Do you feel personally affirmed about what you proposed? How do you feel about the board’s responses?
2. You and your spouse may already begin to ponder what retirement life may be like: leisure time, family contacts, ministry activities, time with friends, and so forth. Do you have a sense of how to balance them?
3. What challenges do you have in managing your emotions?
4. Are there some members to whom you and your spouse want to express personal goodbyes? Did you foresee that some would be harder than others? Have relationships with parishioners, friends, and colleagues in your life meant a great deal to you? Do you think that retirement will make it possible to do more justice to tending to relationships?
5. Are you retiring because of age or health or because of misgivings toward the church? If the latter, would you try to resolve some or all of it?
6. Discuss the following proposition with your spouse or trusted friend: “Retirement is not just **from** something but also **to** something.” Can you verbalize what you expect from retirement?
7. What do you hope for, and how are you actively living your life toward that hope?
8. What emotions do you experience as you move through the “lasts”, such as the last baptism, the last Lord’s Supper, the last wedding, the last board meetings, your final bulletin, cleaning your desk, and so forth?
9. Make a list of the churches you have served. Consider the highs and lows and the lessons learned.

NEXT STEPS

Design a blueprint of the modifications in your ministry as agreed between you and the board for the remaining time in your ministry. You may wish to add a description of the goals you have set.

1. Identify the farewell rituals that will result in a meaningful conclusion to your ministry.
2. Finalize your financial planning. Determine how much money you need immediately upon retirement. List the expenses involved in moving (and how about that trip you had agreed to take?), before checks begin to arrive from your Servant Solutions Retirement Plan and/or Social Security (US) and/or Old Age Security and Canada Pension Plan (Canada). Check whether you are on target in contacting the institutions involved.
3. Investigate your medical insurance to see if it is adequate for your needs. Research long-term care insurance. Draft advance directives to provide for you or your spouse in case of incapacitation.
4. If you intend to remain a member of your last church, write out the boundaries that will govern your involvement in church life.
5. Create a continuity file with information that you think might be of some help to your successor.
6. Seeing that this will be one of the busiest seasons in your career, plan some types of activities unrelated to ministry just for your personal enjoyment.
7. Read *“Transitions: Making Sense of Life’s Changes”* by William Bridges.
8. Make plans to upgrade your will. This is especially important if you move to another state or province.



CHAPTER 3: The Retirement Years



Retirement as the “Third Age”

In challenging the concept of clergy retirement as an ending or withdrawal, Dr. Gwen Halaas in her book ***Clergy, Retirement and Wholeness*** refers to retirement as the *Third Age*. She defines the *Third Age* as “potentially the most important and rewarding time of life” and an opportunity for those of us who have devoted our lives to ministry to use our life experiences to enrich the lives of others. She perceives retirement as an inviting series of “R’s,” such as reappraisal, reaffirmation, reallocation, reawakening, rekindling, renewal, and rediscovery. And these are only some of the opportunities that we have in retirement when we see these coming years as a time of “recommitting to the service of God.”

Maintaining Social and Vocational Health

Retirement can be a challenging time after years of service to others. As a pastor you may have spent as much as fifty years pouring yourself into the lives of others by doing. Retirement involves a shift from doing to being. After years of having your identity and social role defined by your occupation and receiving recognition through your performance and achievement, now as a retired minister you are no longer the central figure. You are not the one standing before the congregation and on whom church members depend for so much care and nurture. The communities that gave you esteem, sustenance, challenges, and even some power no longer enfold you in their reassuring presence. Your social role has changed. A variety of duties will still come your way, though probably less frequently. You will no longer perform them with ministerial authority as you once did. When tasks do come your way, try to perform them in your capacity as a church member and not as a minister. While you have retired from your occupation, you have a vocation until the end. Sharing your gifts and talents and the love of God with others will continue to give you a sense of purpose.

Successful retirement means the formation of new social networks that also meet physical, emotional, intellectual, vocational, or spiritual needs. In your working years many of your relationships focused on work-related topics. Retirement provides an opportunity to pursue other social activities such as sports, continuing education, and hobbies. The best situation is one in which you are eager for retirement because you have so many other activities going on.

Catching Your Breath

The last several months in the ministry were inevitably very demanding and draining. There were so many arrangements you had to make, so many last-minute decisions. Among your many tasks were several that were new even to a veteran of your caliber. Thus, you may be tired the first while of your retirement. Add to this the fact that you have gone through numerous changes, many ushering in new situations. You live in another house, another neighborhood, another community, and engage in a totally different daily routine. Changes take much more out of you than you may have expected. Recognize it, acknowledge it!

Take time to rest. Slow your pace. Take an afternoon nap. Seclude yourself with a fascinating book. Take the luxury of postponing things awhile if they are not urgent. Go for walks, and take note of nature's beauty. Say hello to people you see around. Have a cup of coffee in the nearby restaurant. Take a modest vacation that does not take the world to arrange. Talk with the Lord a bit more than you were used to. It is true that roses and coffee can be smelled. Fill the early months of your retirement with recuperative moments!

Your Health

It is an established fact that older people who exercise modestly and take walks regularly experience more wellness than those who do not. Good physical health benefits both emotional and spiritual health, and vice versa. Muscles may rebel against stretching, and joints protest vigorous movements, but do not give up. The key is consistency.

Adopt a healthy diet. Well-regulated sleeping habits are always helpful, but you will also find that wakeful moments just happen.

During the retirement years there will be trials, big and small. They are unavoidable. We are thankful for the skills of doctors and the effectiveness of medicines, but know that they can only do so much. Annual physical checkups may diagnose illnesses in a timely manner.



These evidences of diminishment will inevitably create a fleeting sense of loss. Loss always produces some sadness. Woven through many of life's activities are the little reminders of life's brevity. It is good that you recognize and acknowledge them. Coping with loss may not be easy, but husband and wife should communicate. Share each other's burdens. Sometimes just explaining how you feel, without expecting advice, is helpful. Many of God's dearest children have known deep sorrow during their life's evening. Retired pastors have at times sought out the services of a professional counselor, which may be a good idea if only to check whether you are emotionally and mentally on target. Be sure to be each other's caregiver, and your own not any less.

As you live with good care, be sure that your motives are not to stave off old age. Do not spend precious energy and wellbeing denying the onset and reality of old age or even fighting it. Remember that aging comes with promises, too. In 2 Corinthians 4:7-18, Paul tells us in so many words that as we, inevitably, diminish physically we can grow stronger in the Lord, and he actually connects the evidences of our mortality with Christ's immortality.

Mentally, you may also begin to sense diminishment. Recollection of names can be annoyingly slow at times; thought connections may be less easily made; events are readily forgotten. Do not give up too quickly! Challenge your mental faculties. Read. Perhaps you have considered taking up membership in a book club. Stay current with events, do crossword puzzles, write, and keep abreast of news in church and society. When visiting, do not dwell too much on your conditions but contribute toward stimulating conversation. Remain interested in significant developments, but do not decry the unfortunate developments in today's society too emphatically.

Your Marriage Partner

Acknowledge that in retirement your spouse must also face new situations. Try to understand what they are because several may differ from yours. Explore the new territory together. Identify and discuss the issues and concerns each of you have. You will pursue interests both together and separately. Strive for a balance with which you both feel comfortable. Talk a lot about your experiences and observations, and be sure to be a good listener.

Consider also how your retirement affects your children and grandchildren. Perhaps your house is now smaller and you can no longer accommodate children with families. Perhaps distances between you and them have become longer or shorter. All these changes bring along their own relational dynamics and need your attention.

Continued Service

Have you been asked to preach now and then? Wonderful! Writing a new sermon and preaching it with élan will keep you alert and vital. Consider it an extra gift from the Lord. Remember that He did not promise that invitations would keep coming year after year. Be an engaged listener whenever you attend church services in your new congregation. Remind yourself how blessed you are that the Lord reached out to you in the pew and touched you once more with His grace. There may be insights that were not found in your own sermons but that you now just happen to need.

Do you find it a bit difficult to be active in your church without having a guiding role and without wielding a bit of power? Most of your retired colleagues could testify to similar experiences. Remind yourself that it is an honorable thing to stay in the background. Thank God that He provides generations of leaders time and again to His church. You can rest secure now. You handed your successor your mantle, and you would not want to have it back.

In the meantime, it also remains true that you have a whole set of special skills and capacities. Should you use those if the opportunities present themselves? By all means! Some of them may be on a volunteer basis, some for pay. Perhaps you are invited to teach a class in your church or in a neighboring church. Perhaps you are asked to be a regular visitor of the sick. Some retired pastors serve churches that have no regular pastor. All of these are honorable activities through which church and kingdom will flourish.

Strike a balance. Follow your interests. Accept play and entertainment as gifts of God. Make new friends. Challenge yourself. Put your gifts and skills to work in keeping with your interests.

Trials

Your health will gradually become less robust as the years go by. As husband and wife, you may become more dependent on each other. Your daily chores begin to take more time. You tire more easily. Aches become more frequent. Hearing and seeing become problematic. You are reminded that you have no abiding city here. Still, the gift of life is precious, and you are reluctant to hand it back to God. The thought of dying makes you sad. Doubts have a way of creeping up on you. Do not be surprised that you, together with many of God's children, have sudden doubts about whether you are saved. You preached grace, now you must cling to it yourself. Gradually, you will long for your eternal home where, together with all believers of all places and all ages, you will praise your Maker forever.

Widowed

Some of you who read this training tool will have lost your spouse through death. For you, the retirement years will be much harder. Loss and grief affect your whole life. No one can fully understand the depths of your pain or its many aspects.

For those of you who have only recently lost your spouse, the shock is still real. Try to encounter the loss. The reality of absence will always remain, but the emotional wounds need healing. Embracing the hurt may help that healing process. At the most unexpected times, your tears start flowing again. God sees the pain in your heart. At times, you may feel yearning and confusion, and you may be disoriented and disorganized. You may struggle with fatigue as never before. A variety of feelings may weigh you down. Fear may trouble your heart. Mourners have also experienced anger, sometimes without a focus. Feelings of guilt are often prevalent: "If only I had done this...." Grief never comes cleanly by itself. Perhaps you had never realized before that you could feel so terribly lonely or that depression could be so fearsome and paralyzing.

You will find it helpful if a thoughtful friend will listen to your story—how it all happened and how you feel now. You may also find some consolation in reflecting on the memories of your loved one. Look at pictures again and remember the details of precious moments. Some of your fellow mourners have written down their memories. By way of prayer, sometimes anxious, desperate prayer, you begin to find your way back to hope, meaning, and self-care. Lamentations 3:19-26 is a personal chronicle of sorts from the grieving heart of the prophet Jeremiah:

*I remember my affliction and my wandering.
I will remember them.
My soul is downcast within me.
Yet this I call to mind and therefore I have hope:
because of the Lord's great love we are not consumed,
for His compassions never fail.
They are new every morning;
great is your faithfulness.
I say to myself,
"The Lord is my portion; therefore I will wait for Him."
The Lord is good to those, whose hope is in Him,
to the one who seeks Him;
it is good to wait quietly for the salvation of the Lord.*

End-of-Life Arrangements

Duties that are linked to your departure from this world are never easy. Perhaps you have already postponed them for some time, but one day you need to sit down, perhaps with your spouse or an older child, and discuss what needs to be done and how you should go about it. Make the prearrangements for your funeral or yours and your spouse's if he or she is still at your side. You may want to discuss the details of your funeral service, or you may let your pastor take care of it as he or she sees fit. You may want to write the liturgy and select the Scripture passages yourself. Both are proper.

You should meet with a designated member of the family or a trusted friend and express all desires you may have regarding situations surrounding your departure. Let them know where they can find vital information, such as your will, estate planning, insurance policies, bank accounts, funeral arrangements, and so forth.

Advance health directives are a gift to your family. A living will is a signed document that makes known your wishes about what kind of treatment you want when you are ill or injured and not expected to recover. You may also wish to set down in writing your life story. Values and dreams for the future are a gift to your family. This has been called an "ethical will" and it provides a way for you to leave a legacy with those you love.

CELEBRATING THE MINDFULNESS OF BEING

At our age we have to face the reality of death. Our prayer in Psalm 39 is answered. We are starting to calculate—to number our days. We sense how fleeting our life—a mere breath. Death’s messengers are starting to come with greater frequency and speak with sharper clarity. The persistent pain that now never leaves us, the shortness of breath on the stairs, the death of a friend. We are not dealing with death in the abstract now, it is our personal death that we are thinking of now. With the poet T. S. Eliot we may say:

*“I have seen the moment of my greatness flicker,
And I have seen the eternal Footman hold
my coat and snicker.”*

At our age death is the reality we must personally face. And we ought not to join a death-denying society and run from it. But why should we pray Psalm 39 and learn to number our days? Is it not because of the paradox that through the reality of death, that we learn to more deeply appreciate and enjoy everlasting life?

When considering the influence of death, it has been suggested that people pass through life in one of two stages of awareness: “forgetfulness of being” or “mindfulness of being.” When a person is in the state of “forgetfulness of being” he or she never really thinks of things of real meaning and significance. He or she is preoccupied with all the activities of living. We are alive, but we don’t fully live.

When we are confronted with the reality of our death, it can shift us—jolt us—into a state of different awareness: “mindfulness of being.” In this stage we have the opportunity to really experience the joy of life with depth and authority. But this mystery of being fully alive comes with a price: grasping the reality of death. Mindfulness of being only comes by numbering our days. Few people have the courage to live fully because few people have the courage to fully face death. But we can do it. We know that in Christ death has been conquered.

We trust that there is everlasting life—abundant life all the way.

From: The Paradoxes on the Autumn Journey - Philip De Jonge

REFLECTIONS

1. Do you think of yourself as one who leaned toward doing or toward being? What were some of the implications for your personal and professional life?
2. What are your social networks? How do they keep you healthy?
3. What did the church communities you served mean to you? Which ministry activities did you like best?
4. In what ways have you felt the presence of Christ in this retirement period so far? Was it different from your ministry years?
5. Can you appreciate people who are different from you in background, in culture, and in faith?
6. Have you had moments when time hung heavy on your hands?
7. How are you actively connected with your community? What gifts do you have to contribute to improve community life?
8. What is the purpose of this time of your life? Do you share that purpose with someone else? How are you planning toward that purpose?

NEXT STEPS

1. List some fun things to do; things you have not seriously tried before. List some other activities that could lighten your retirement years.
2. Discuss ways in which you can broaden the horizons of your interests.
3. Make a covenant as a married couple that you will always make time to listen to each other's concerns.
4. Make a list of exercises and then consider whether you want to commit yourself to a regular exercise regimen.
5. Discuss ways in which you are living out your faith.
6. Consult legal help to draw up your will, advance directive, living will and ethical will. If you already have these, see whether they need to be updated. With whom have you shared these?
7. Do some research on the services that are available in your area for the elderly.
8. Research the possibilities of attending a spiritual retreat geared to your needs and interests.

CHAPTER 4: So Your Pastor Will Retire *A Word for Elders and Church Boards*



No matter how much you love your pastor, and no matter how richly his or her work is being blessed, your pastor will not be with you forever.

This training tool is meant to help not only the pastor but also the board in playing a helpful role in the retirement of their pastor and, possibly, spouse.

Participants in Planning

Some of Chapter 1 is devoted to assisting your pastor in doing imaginative planning around his or her upcoming retirement. It would be in the best interest of both your congregation and your pastor if you as elders and board members would also play an active role in that planning.

Overall preparation time for retirement consists of two parts: an early part that focuses on concluding the pastor's ministry and a latter part that focuses on the actual transition from the ministry to the retirement itself. The length of the first might be as long as three or four years; the second, perhaps one year.

It is also observed that this ample time frame will enable the pastor and the congregation to see this concluding chapter of ministry as an opportunity for a renewed round of planning for the congregation's future ministry.

Planning always needs to be preceded by a careful evaluation of the various parts of your present ministry program. This will involve a critical review of each program detail with respect to its effectiveness and returns. The outcome of this type of planning will help you to formulate and reformulate a carefully delineated church program and to set goals accordingly. You and the congregation will understand that your focus is to be on the specific time period set aside for the preparation of the pastor's retirement. You may well find that this type of planning has an invigorating effect on both the congregation and the pastor. It will prompt the participants to come up with helpful appraisals, creative thinking, and fresh initiatives.

You may be open to the possibility of renegotiating the details of your pastor's ministry responsibilities. Try to come to an understanding as to what the pastor's gifts and interests are and then reformulate a job description in keeping with them. Your pastor will work with greater happiness if the majority of duties are shifted to areas for which the pastor is best suited.

You may consider asking gifted members in your congregation to perform some of the duties from which you relieved your pastor. When goals are carefully and realistically formulated, capable members are more ready to offer their services. You may also consider hiring some additional help in this regard.

You and your pastor may wish to reflect on the primary emphasis of his or her work. There may be areas to which the pastor would need to devote more attention and in some others to cut back a bit. You and your pastor might identify some concerns to be emphasized in the preaching. Preparations of this sort will pave the way for helpful planning for the ministry of your next pastor.

Early on, you as the board, in consultation with the pastor, would do well to appoint a small planning committee composed perhaps of three or four wise and trusted members. This committee should give guidance in matters of retirement and assist the board and pastor with planning. It might begin its work by visiting the pastor and spouse and talking informally about their wellbeing, work, and future. From then on, the committee should walk alongside the pastor through the last stages of his or her ministry.

It is mostly in the way of serious planning and evaluation involving pastor, board, and congregation that pastors end well and, therefore, finish strong.

Moving Through the Concluding Chapter of Ministry

1. Alerting the planning committee

Alert the appointed planning committee to refine, and possibly reformulate, its mandate. In consultation with the pastor, the committee may list and broadly schedule the events related to the pastor's final years in the congregation. Regular contact with the board remains important. Prominent among the committee's responsibilities will be planning the farewell service and the various social gatherings with the congregation and groups within the congregation. It is also important to consider how the congregation can best express its gratitude to the pastor for his or her years of ministry. It always remains important to summarize and monitor planning throughout its various stages.

2. Debriefing the pastor

The board chairperson is in a good position to conduct the debriefing of the pastor, and if thought beneficial, also the spouse. The pastor may be given the privilege of appointing additional participants for this process. The agenda for these sessions should be carefully prepared.

Some matters to review may include:

- the congregation's spiritual life
- the ministry program
- congregational unity and vision for growth
- quality of leadership
- the pastor's assessment of his or her own ministry performance
- areas in which blessings were evident; possibly also problem areas
- misgivings the pastor may harbor, some perhaps unresolved
- the pastor's reasons for seeking retirement

The board may also suggest that the pastor have a brief interview with each one of the present elders and board members and other leaders in the church.

3. Caregiving

The elders and other concerned members will be aware of the reality that these months of transition may be spiritually draining to the pastor and his or her family. You will want to surround them with sympathetic care. You realize that both the pastor and spouse have to make a large number of decisions and arrangements (where to live, housing, family adjustments, pension, finances, health insurance) that are mostly personal. However, the board and the planning committee should show due interest and, where possible, give advice and encouragement.

The advantages of an extended time of retirement arrangements will allow you to encourage your pastor to take a brief sabbatical and to tend to emotional and spiritual needs. In all these steps the elders should be careful to validate the pastor in his or her work and as a person.

4. Calling a new pastor

A growing number of churches call an interim pastor before installing their next pastor. That has proved to be an advantageous way to go for many. This interim arrangement enables a congregation to grieve the departure of their pastor and to find its spiritual and emotional balance. This is also a good way to prepare the congregation for a new chapter of ministry. We strongly recommend it!

Even if you should choose to have an interim pastor, you should not unduly postpone commencing the calling process for your next pastor.

You will begin the process with the appointment of a search committee. The process is usually described in your church bylaws. Your state church office can assist you throughout the search process. Your current pastor should be careful not to influence the proceedings. Should the board maintain contact with the pastor once he or she has left? Yes, by all means, but such contacts have to remain discreet. An emeritus pastor will generally not play an ongoing pastoral role in his or her last church.



REFLECTIONS

1. Does your congregation have some experience with planning? What do you see as advantages in reflecting on the quality of the many forms of ministry in your congregation? Do you see risks?
2. Some critics may say: "You are making too much of this retirement." What would your response be?
3. Which emotions might play a role in the reality of a pastor's retirement, both with respect to the pastor and spouse and the individual members of your congregation?
4. Generally what are good reasons for a pastor to apply for retirement? Could you think of less-than-good reasons?
5. Do you know of one of your neighboring churches that have recently said farewell to its pastor? Can you learn from what they did?
6. What are the senses of loss your congregation may experience when your pastor is finally gone?
7. What are some ways in which you can maintain appropriate contact with your pastor couple after they have concluded the ministry among you?
8. What are some advantages of engaging the services of an interim pastor?

NEXT STEPS

1. Alert the officers of various committees, classes, and groups in your congregation of the upcoming retirement events.
2. Keep in touch with your pastor at all times. All planning of activities should have his or her input.
3. Set a series of dates on which you will meet with your planning committee.
4. In consultation with your pastor, contact your Regional Pastor and Overseer or Credential Chair to keep him or her informed about upcoming events surrounding your pastor's retirement.
5. Designate a member of the board to send a letter to other retired ministers of your congregation and inquire about their wellbeing.
6. What are some ways in which you can encourage your pastor and spouse during these demanding weeks and months?
7. Talk with some members of your church who have recently retired. What can you learn from them?
8. Brainstorm regarding the program for the farewell service and the farewell evening. Review the arrangements that were made so far.

APPENDIX

Saying Goodbye and Hello

I. Your pastor has decided to leave. What does the Pastoral Transition Committee do?

Saying goodbye well is essential for the health of the pastor and his or her family and for the congregation. The farewell prepares the way for the future. Saying goodbye well allows the pastor to move to the next congregation without “excess” baggage and it allows the present congregation to begin to prepare for the next person who will come to them and be their pastor.

- A. Hold your pastor and your congregation in prayer.
 - 1. Deciding to leave is usually difficult, because the decision usually affects the lives of many people—the pastor, the pastor’s family, the congregation being left.
 - 2. Be as supportive of your pastor through the process as you can.
 - 3. Seek what is best for both your pastor and the congregation.

- B. Treat the information carefully.
 - 1. You’re likely to be among the first to know the decision.
 - 2. Don’t share it until the agreed-upon time.
 - 3. If you are asked to be a reference, be fair, kind and supportive.
 - 4. Don’t hand out the details of why the pastor is going unless that is information he or she is ready to share.

- C. Decide with the pastor how, when, and where information will be shared.

II. Saying goodbye is important for everyone.

- A. Even if the road has been rocky, the pastor’s departure will cause grief for the congregation and the pastor.
- B. Arrange opportunities for saying goodbye to the pastor, and if he/she has a family, arrange ways to include them. If yours is a small town, you may also need to include the larger community.
- C. Encourage the pastor to say goodbye to various groups and individuals throughout the life of the congregation.
- D. Encourage the pastor to write a goodbye letter saying why he/she is leaving.
- E. Communicate expectations and plan with your pastor so that at the end there are no unpleasant or unplanned surprises that leave a bad taste. This might include such things as:
 - 1. Date of leaving, leftover vacation time, share of continuing education funds, payments to Servant Solutions Retirement Plan.
 - 2. Special needs of congregation— (unless absolutely unavoidable, it’s helpful if the pastor does not leave during a major season of the Church year: i.e. November-December, Lent through Easter).
 - 3. Special needs of pastor and pastor’s family.
 - 4. Mutually agreeable time for farewell from church.

(The above may need final approval from the personnel committee and/or the board, but if the preliminary thinking has been done and concrete suggestions can be made, it is often helpful.)

III. Exit interview

- A. This is an opportunity to share learning and insights, both ways.
- B. Include appropriate persons (elders or board or even whole congregation, if that fits the needs of the congregation and the departing staff). Having a regional staff present can be helpful to the pastor, the congregation, and the region.

IV. On Moving Day

- A. It may be helpful to have people there to help with moving. However, this needs to be done in consultation with the pastor and his or her family.
- B. Bring lunch, pot of hot coffee or whatever may be helpful to the family.

V. Say Goodbye

- A. Recognize and acknowledge that the congregation and the departing pastor will have a lot of different feelings, all of them a normal part of the grief process.
- B. When the pastor and family leave, their relationship to you and to the congregation changes. Some people will feel angry about this.
- C. Help people understand it is not appropriate to call their former pastor and ask him or her to come back to do a wedding or a funeral (except in very rare and unusual circumstances).
- D. When you go to visit or the former pastor comes to visit you, do not spend time talking about the church.
- E. Put the former pastor on the church's mailing list. Friendships last beyond a pastorate and former pastors like to know something about the life of your church and members.

VI. A new pastor is coming to your church. Are you ready?

- A. In the time between the departure of your former pastor and the arrival of your new pastor, the church has had work to do. How well that has been done will affect what happens when the new pastor arrives.
- B. If you've had an interim minister, you may have had an opportunity to grieve for the pastor who left, the unfinished dreams and projects, "the might have beens."
- C. If you've had an interim minister, you may have had an opportunity to look at the church's history and vision for the future.
- D. The parsonage, if you own one, hopefully has been cleaned and refurbished ready for the new pastor.
- E. The search committee has been at work for months to find the pastor who is the right fit.

VII. Now he or she is coming. What do you do and who is the "you"?

- A. The Pastoral Transition Committee is usually made up of persons chosen by the pastor, but when a new pastor comes he or she doesn't know anyone. So the first group may be made up of those who were on the search committee with whom the pastor is at least somewhat acquainted and who can help in the transition. Gradually as the pastor is there, the composition of the committee needs to change.
- B. Getting Ready
 1. Hold your new pastor and congregation in prayer.
 2. Consult with your new pastor about special needs, concerns, desires as he or she moves into your community.
 3. Provide some ways for the congregation to become acquainted with the new pastor. (This might include such things as gathering small groups in homes for dinner or dessert or hosting "Saturday mornings with the pastor" according to what fits your congregation and your new pastor).

4. Help your pastor and his or her family find their way into your community. It is easy to forget how much there is to learn when you move to a new place. All the familiar things are gone and a move means finding new doctors, schools, the hospital, where to buy a favorite item, a veterinarian.

Helpful things might include:

- a. Where do they find a doctor? Dentist? Shopping mall?
 - b. Provide a map of the community and mark places they will want to locate, such as schools, church, etc.
 - c. Provide a picture directory of the congregation.
 - d. Provide information about the community and its resources.
 - e. Go sightseeing with your new pastor and family.
 - f. If a home is to be purchased, find a realtor. Taking the pastor (& spouse) around town can be helpful.
5. Help your pastor and his or her family make connections. For example:
 - a. If there are children, arrange introductions to other children of similar age.
 - b. If there is a spouse seeking employment, introductions may be helpful in making the transition easier.
 6. Help your new pastor learn about the community and congregational cultures. (Every group has its own culture and someone new coming in has to rely on clues and friends to avoid missteps.
 - a. Tell the congregational stories.
 - b. Invite your pastor to visit with the different groups—make sure he or she knows what time and where groups meet.
 - c. Invite questions about why you do things the way you do them—it can bring fresh air into old ways.
 7. Be clear about expectations.
 - a. Share dreams—yours, theirs, the congregations.
 - b. Provide information about the congregational structure, policies, constitution, bylaws, etc.
 - c. Let the new pastor know “what everyone knows or does in Great Community.” For example, if everyone goes to the ball games, invite the new pastor to go and provide the tickets.
 - d. Help your pastor avoid what might be pitfalls for the uninitiated. If there are particular people he or she needs to meet, introduce them. If there is a group that goes to lunch on Sunday, invite them. After they begin to get to know their new environment, they may want to make some other choices, but choices made in ignorance can create problems.

8. Expect your new pastor to come with new gifts.

9. Deal quickly with unreal expectations.

For example: Pastor thought she had agreed to full time at 40 hours per week, and the congregation is expecting 55 hours. Or the pastor understood the church would pay health care through a certain company, and the church has purchased something else, because it costs less. Or, the pastor prefers to work at home one day a week, to avoid interruptions, and the congregation expects the minister to be at the church office every day at agreed-upon hours.

- a. Invite the pastor to put the issues before the group, so that they are in the open instead of festering in the dark.
- b. Invite a regional staff person to help resolve the differences.
- c. Look for the win/win solution, or this can quickly become a lose/lose.
- d. Look for the solution that is most fair to all concerned.

10. Encourage your pastor to take days off. We all need time for recreation.
11. Become an advocate for your new pastor:
 - a. Acknowledge how fortunate your congregation is.
 - b. Find ways to help the congregation understand the salary package, for example, or any special agreements intended to strengthen ministry, such as future study or sabbatical time.
12. The first days of a new ministry are crucial, but transition takes much longer.
 - a. Moving in is just the beginning.
 - b. Expect some things to go very well and forgive the mistakes quickly. Building a good ministry is everyone's work.
 - c. Anticipate change and encourage flexibility.
 - d. Allow the pastor time to settle in and begin to feel at home.

VIII. The effects a departed pastor's continuing contacts have on a congregation.

- A. Contacts continue to resurface for members whenever negative emotions were present at the pastor's departure.
 - Regret: "It's not like it used to be."
 - Inadequacy: "He left us for a better church."
 - Guilt: "Why didn't I do enough to make her stay?"
 - Anger: "Why did he leave us flat?"
 - Loneliness: "I miss him/her."
 - Frustration: "If he were here I could cope."
 - Relief: "I'm glad he's gone and we don't have to do that anymore!"
- B. Contacts deny members the opportunity to work through those emotions of grief directly and constructively, and encourage their futile grappling with ghosts.
- C. Contacts discourage members' working through their feelings within the community ("I'd better not tell my deacon that I called the old pastor") and encourage a rivalry among members ("The pastor called me!")
- D. Private contact with individuals deprive the community of the opportunity to share grief and loneliness, to build the strength that comes from shared suffering, to discover resurrected hope that emerges from shared struggles.
- E. Contacts focus members' energy outside the congregation at a time when that energy may be needed most within the community.
- F. Private communications encourage "holding on" to the past and righting former battles—this time with the invisible contenders, who decrease a person's ability to struggle with present realities and diminish hope for the future.
- G. Contacts confuse persons as to where and how to direct their commitment to new leadership; they make that difficult task even more difficult for members.
- H. Each contact places the resident pastor in the awkward position of interloper. Interim specialists are trained to deal with the negativism so that the installed pastor can begin positive building at the earliest opportunity.
- I. By surfacing implicit comparisons between new and old, contacts undermine the choice of a new pastor and inhibit a whole-hearted commitment to the new relationship.
- J. Contacts keep the new pastor on the defensive and subvert that pastor's morale and effectiveness. The new pastor can never successfully compete with the old pastor's enshrined "ghost" so long as that ghost is actively present.

Source: Saying Goodbye by Edward A. White

MINISTERIAL TRANSITION GUIDELINE

The time of transition from the outgoing minister to the interim to the incoming minister is an opportunity to witness mutually supportive collegiality among clergy. We speak words of cooperation, compassion and dedication to the overall church. Our actions speak even louder. It is a credit to the clergy and congregations of the Church of God that almost all ministerial transitions are healthy ones.

The basic concerns of avoiding abrupt departures, facilitating closure and enabling the ministry to continue smoothly are applicable to all ministry forms. Even within the congregational transitions there are many variations. It is recognized also that transitions do not always progress in clear and distinct steps but that there are often overlaps in the process. Adapt this guide to fit your particular situation.

1. Closure

It is important, even in the midst of planning for the future, that the need for closure by the congregation and minister be addressed. A healthy departure allows for evaluation, celebration, grief work, forgiveness, and preparation for the continuing pastoral care of the congregation, the departing minister and his/her family.

The close relationships that develop during one's ministry with a congregation make the process of professional separation and establishing a new relationship challenging. It helps if the decision to resign can be delayed until one is certain of God's call to a new ministry or until one is genuinely comfortable with the concept of retirement. Though some circumstances (such as health or family requirements) might necessitate making a departure before one is completely comfortable with the decision, still the ongoing spiritual health of the congregation must be everyone's primary concern. Certainly the spiritual and emotional needs of the minister are important, but the minister's calling is to serve the church, not to be served. Thus the outgoing minister does not seek to influence the search and call process, makes a clean break with the congregation, and does not attempt to continue participating in pastoral functions such as celebrating weddings and funerals, or making pastoral hospital visits and calls unless asked to do so by the current minister.

Pastoral compassion can best be expressed in doing everything possible to make the transition smooth and efficient. Compiling the items in the Exit Checklist is an excellent way to empower one's successor for the continuation of pastoral care and administration. It also is an excellent opportunity to honestly acknowledge mistakes, offer and receive forgiveness, and work through some of the natural grief that comes with ending the uniquely close pastoral ties which have developed.

Establishing and complying with the Covenant of Closure will communicate clearly that one ministry has come to a close and that everyone is committed to the establishment of an effective new ministry. Participating in a farewell celebration is a visible way for the community to say goodbye and to achieve healthy closure. These kinds of celebratory processes are especially important in situations where there has been conflict. The need for forgiveness, healing, and acknowledgment of the positive aspects of the ministry are important steps in the transition.

2. The Interim/Transition

A growing number of clergy feel their primary calling is to interim/transition ministry and have taken advantage of advanced training in that field. There are many resources available for the interim/transitional minister. As the transition process begins, it will be important to establish a clear contract. Your Regional Pastor or Overseer can give you guidance in those mechanics.

Interim/transitional ministries vary greatly in length and focus. Your state office can be an important resource as a facilitator for the Exit Checklist as it is updated, and an exit interview could offer opportunity for the interim/transitional minister to share insights from a different perspective than has been previously shared. A farewell celebration offers an opportunity to express gratitude and achieve closure with the interim/transitional minister.

This process may be adapted depending on the particular circumstances of the interim/transitional period. However, it should be remembered that within the unique relationship of pastor and congregation, close ties form very quickly. The need for a caring and intentional process of departure should not be underestimated.

3. The New Ministry

Since this resource is aimed at healthy conclusions of ministries, it does not attempt to give thorough guidance on the Search and Call process. Your Regional Pastor and Overseer will be able to provide forms for the Letter of Call and other pertinent documents. However, you may want to consider establishing a Covenant for New Ministry between the outgoing Minister and the congregation. This may happen at times of retirement or when a minister leaves a congregation to begin different ministry work.

A Covenant for New Ministry can be a helpful tool if a former minister returns to the community and resumes membership in the congregation. All situations are different and no document could anticipate all the complex variations that will present themselves. The following considerations are offered to guide the forming of the Covenant for a New Ministry:

The ability of the congregation to form a trust relationship with the current minister and to move forward in its spiritual journey is of highest concern. Weddings, funerals, visits and communication at times of crisis, illness, or joy are often the most powerful opportunities for forging and nurturing the pastoral trust relationship.

Generally, the longer the previous pastorate lasted and the deeper the trust relationship which existed, the bigger the challenge for congregations to build trust with the incoming minister and to perceive that person as their pastor. This is the reason former ministers are encouraged to separate themselves from the congregation during the interim/transitional period and for one year after the arrival of the new minister.

One's ordination and call to ministry do not end with retirement nor with the change to a non-congregational ministry. In many situations, a former minister can be a wonderful colleague and a great asset to the current minister.

The new minister and lay leadership together can best determine whether the situation is one in which a former minister can be successfully reintegrated into a congregation. Your state office may be called upon to help establish a Covenant for New Ministry. The pastoral transition committee or a similar group from the congregation should also be included in the formation of the covenant.

When the former minister visibly and vocally supports the current minister, steadfastly refusing to do anything that would weaken or undermine the current pastoral trust relationship, and when the new minister affirms the gifts of the former minister and finds opportunities for the appropriate expression of those gifts, the whole church benefits and learns to cherish mutual respect and cooperation.

EXIT CHECKLIST

For Pastors Leaving A Church

This is a list of items which could be very helpful to the congregation and incoming interim/transitional or installed minister. There may be some items that do not apply. Adapt as necessary.

- _____ A complete and up-to-date membership list of total and participating membership. This database should include records of membership, attendance, baptisms, marriages, births, funerals, and transfers in and out. It should also include names of children.
- _____ The current mailing lists, clearly identified as to their content and usage.
- _____ A list of military personnel from the congregation.
- _____ A list of college students from the congregation.
- _____ A list of shut-ins for whom the congregation is responsible.
- _____ A list of prospective members with some notation as to their status and interest.
- _____ A list of the current officers and members of the committees of the congregation and a list of officers from recent years.
- _____ A list of the church school teachers, active and inactive.
- _____ A roster of the congregation's children and youth - listed by age or church school class.
- _____ A list of organizations and officers.
- _____ Notes on affiliations of the congregation with community, state, and national organizations.
- _____ A schedule of regular and special meetings of the congregation.
- _____ A full-year church calendar of regular events.
- _____ Notes on special Sundays and important traditions observed in the congregation.
- _____ Sample worship bulletins, notes on how regular worship services are typically planned, as well as how and when the bulletin is prepared.
- _____ A list of upcoming programs and projects, special and ongoing, in effect or planned. These should have notations about contact persons and location of pertinent information.
- _____ A list of situations that need follow-up, such as: counseling, anticipated or planned baptisms, scheduled weddings, reception of new members, crises, pastoral care issues and people needing continued help (food, clothing, housing, etc.)
- _____ The congregation's constitution and by-laws, governing policies and personnel policies.
- _____ Names of staff or personnel, their job descriptions and location of past performance evaluations.
- _____ A current financial report and budget.
- _____ A list of community agencies to which referrals may be made.
- _____ Information on location of hospitals and parking requirements.
- _____ Information on local clergy associations and ecumenical groups.
- _____ A list of goals, both short-range and long-range, which the church has accepted, and their status.
- _____ Members of the prayer chain or other prayer groups.
- _____ Sample letters currently being sent to Sunday morning visitors, new members, etc.
- _____ Copies of several recent newsletters and notes on the process of its production.
- _____ Up-to-date files for various services and vendors (e.g. legal, property, auditing, supplies).
- _____ A complete set of church keys, clearly marked or with a list identifying each key and what it is used for.
- _____ Information on other items that the pastor knows about which would be essential for a smooth transition.

COVENANT OF CLOSURE

MINISTER

I will separate myself from participation in the life of the congregation from which I am resigning or retiring during the interim/transitional period and for at least one year after the arrival of the new pastor.

I will be a true and loyal friend to my former congregation and to its minister by not making pastoral calls, hospital calls, or counseling with members, not presiding at weddings or funerals of former parishioners, and by declining all offices, positions and responsibilities in this, my former congregation, except at the invitation of the current minister.

I will confer only with the state office or the current minister of this congregation about any problems I perceive in the congregation, and not discuss them with members of the congregation or others.

I will communicate with the state office should confusion, conflict or other differences arise between myself and this congregation.

If at the end of one year after the arrival of the new pastor I wish to participate in this congregation, I will communicate such interests to the Regional Pastor and who will facilitate discussion of this possibility with the congregation and its pastor. If such participation is deemed appropriate, a "Covenant for a New Ministry When the Previous Minister is Remaining in the Community" will be established.

I reaffirm my vows as an ordained/licensed minister. Relying on the grace of God I also reaffirm my commitment to the "Ministerial Code of Ethics" of the Church of God.

SIGNED

Outgoing Minister

Date



Servant Solutions
YOUR RETIREMENT & FINANCIAL PLANNING PARTNER

Serving Those Who Serve



(800) 844-8983



info@servantsolutions.org



servantsolutions.org