

# Separation Ethics Guidelines

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# Guidelines When Pastorates End

## BACKGROUND

The pastoral relationship is very important, often deeply personal, and in some cases, lifesaving to people in a congregation. This relationship evolves through study, teaching, preaching, administering the sacraments of Baptism and Communion, weddings, funerals, being present in crises, and praying with and for members of the congregation. With the leadership of a congregation and particularly with the elders, the pastor works to encourage the people in the worship and service of God, equipping them for their tasks within the church and their mission in the world. In all of these dimensions of the pastoral relationship, there are the elements of trust, confidence, admiration, affection, fondness, caring, and love.

The ending of the pastoral relationship is often a trying and traumatic experience for both the pastor and the congregation. It always means change and transition for both. One of the functions of both the Congregational Care and Development Committee (CCD) and the Professional Care and Development Committee (PCD) is to support congregations and pastors as they attempt to minister effectively during the time of transition. With guidance from the Book of Order and our Presbyterian traditions, the following guidelines offer specific assistance to all parties involved.

These guidelines define ethical behavior for pastors moving to another parish (whether in the community or a distance away), for pastors retiring, those beginning a new pastorate, and for the Sessions and congregations dealing with pastoral separation.

These guidelines on separation ethics shall be given to:

1. The departing/retiring pastor at the session meeting at the time the separation is announced,
2. The incoming pastor at his/her initial interview with the CCD Committee,
3. The congregation when there is a pastoral change. Excerpts should be printed in the church's paper or bulletin under the signature of the CCD Committee.

# The Ethical Principles of Separation

It is inappropriate for a congregation's former pastor to engage in any pastoral activities which intrude on the current pastor's call without a specific invitation from that pastor, including returning to former calls/congregations to provide pastoral services. Pastors shall not foster informal relationships which harm the ministry of the current pastor or pastors in parishes they have formerly served.

## Saying Goodbye to Accept a Call a Distance Away

When a pastor accepts a call to ministry a distance from the congregation which she or he is leaving, the opportunity for contact with members of the former congregation is quite limited, often non-existent. However, there frequently arise certain circumstances which pose questions for the departing pastor as to what is appropriate and what can be most helpful to the congregation and the interim and following pastors. It is always incumbent upon the departing pastor to make sure that parishioners know that her or his relationship with the congregation will come to an end. It is important that parishioners understand that this change of relationship is necessary in order that the congregation be free, in all respects, to make the adjustments necessary for changes of leadership, interim, and permanent, without the departing pastor's influence.

## Saying Goodbye But Remaining a Neighbor

When a pastor says goodbye and remains nearby, there are particularly sensitive aspects of separation which require careful attention on the part of the departing pastor.

The experience of pastors and congregations over the years has led many to believe that when a pastor ends a ministry with a congregation, it is best for the pastor to move out of the community. However, this is not always possible or advisable. Thus, it is particularly important when a departing/retiring pastor remains in proximity to the former congregation, that he/she be sensitive to the needs and responsibilities of the new pastor. The departing/retiring pastor should not be a part of the worship or fellowship life of the congregation except upon the initiative and invitation of the installed pastor and Session. If such an invitation is extended, normally it should not occur until the installed pastor has had an opportunity to establish relationships with the congregation.

## When One is Elected Pastor Emeritus

When a pastor retires, the congregation may bestow upon him or her the title of Pastor Emeritus. The provision for this is found in the *Book of Order* as follows:

“When any pastor or associate pastor retires, and the congregation is moved by affection and gratitude to continue an association in an honorary relationship, it may, at a regularly called congregational meeting, elect him or her as pastor emeritus or emerita, with or without honorarium, but with no pastoral authority or duty. This action shall be subject to the approval of presbytery, and may take effect upon the formal dissolution of the pastoral or associate pastoral relationship or any time thereafter.” (*Book of Order*, G-14.0620)

The purpose of electing one as pastor or associate pastor emeritus is to show evidence of a long and loving, mutually caring pastoral relationship. It is the congregation's way of saying to the church-at-large and to the world that they love this person and are thankful for his or her time with them.

However, the pastoral relationship has been dissolved. The relationship of pastor to people has ended and there is not expectation of the person to be present with the congregation because of the election. All expectations related to the former pastor of a congregation apply to a pastor emeritus.

## **Conduct Responsibilities**

“Separation Ethics” implies certain values which are important to consider during the dissolution of the pastoral relationship. Such values include:

- Effective leadership
- Congregational health and stability
- The growth of pastor and members in dealing with the pain, the problems, and the possibilities of separation
- The ability of the session and congregation to move positively and effectively toward the next phase of their life together.

This material addresses the conduct and responsibilities of the pastor, session, congregation, and the CCD and PCD Committees of the presbytery. Since the pastor is the one in the professional leadership role, the pastor has the responsibility for making sure that the separation is planned and carried through with foresight and effectiveness.

### **Responsibilities of the Departing Pastor**

#### **To the congregation:**

When the date has been set for the dissolution of the pastoral relationship, the departing pastor must take the lead in preparing the congregation for the separation in order to avoid confusion on the part of the members in the days ahead.

It is incumbent upon the departing pastor to make sure that parishioners know that his/her relationship with the congregation will come to an end. It is important that parishioners understand that this change of relationship is necessary in order that the congregation be free, in all respects, to make adjustments necessary for changes of leadership, interim and permanent, without the departing pastor’s influence.

A letter should be sent to the congregation spelling out clearly the matters below, which are part of the separation and transition. A sermon might also contain references to the approaching separation and speak to these matters. In casual conversation one-on-one or in groups, in public presence, in newsletters, in all contacts with people of the congregation, it is important that these matters be communicated and every effort made to have them understood. These matters are:

- That all pastoral and professional relationships and responsibilities of the pastor with the congregation will end as of the effective date of the dissolution.
- That the pastor will not be involved in any way in the selection process of either the interim pastor or the next installed pastor. Neither will he/she be involved in any way with the selection of any search team or pastor nominating committee.
- That the pastor, after leaving, will not become engaged in conversations with church members or staff which, in any way, offer opinions or criticism about the life of the congregation or the performance of the interim or any subsequent installed pastors. (An exception to this rule: if a former pastor receives a call regarding the former congregation from a potential candidate looking for opinions, references, and input about the congregation. In this case, it is acceptable and appropriate for the former pastor to speak freely.)

- That any desire on the part of members of the congregation for the departing pastor to participate in congregational life or services should be discussed not with the departing pastor, but with the interim pastor (or session moderator) or subsequent installed pastor.
- That the departing pastor may participate in a wedding, funeral, or baptism of the congregation after the date of dissolution only by invitation of the session and moderator.

**Note:** This ethic prohibits a former pastor from saying, “Of course, I’ll officiated at your wedding (funeral, baptism, etc.) if your pastor asks me.” It also prohibits a communication to the present pastor that “I am going to be in town and plan to visit John Doe. I hope this is all right with you,” or any other similar verbal or written statement. **These statements compromise the present pastor, making it difficult for him/her to say or do anything but agree to the involvement of the former pastor.**

### **To individual members of the congregation:**

It is important that it be made clear that the *pastoral relationship* will come to an end. This does not mean that *friendships* must come to an end. Friendships are priceless and are to be preserved, but there is a special responsibility on the part of the departing pastor to prevent friendships from becoming confused with the pastoral relationship. The pastoral functions of counseling, pastoral calling, conducting weddings, funerals, or baptisms are not appropriate, unless asked to do so by the moderator of session and the session. Neither is rendering of opinions about the ministry of the former church or its pastor appropriate. **It is the departing pastor’s responsibility to see that this *really* happens.**

If the former pastor receives a request to return to the congregation for a particular occasion, it is important for her/him to remind those making the request that the present pastor or moderator of the Session is the one through whom the request should initially be made.

In instances when a church endures a long period of time without an interim or called pastor, the temptation for the former pastor to remain connected and provide pastoral care is particularly strong. Never-the-less, for the health of the congregation, the pastor must continue to follow these separation guidelines.

In any social context, where the former pastor is with friends or other members of the former congregation, it is the responsibility of the former pastor to be sure that he/she voices no criticism or evaluative comments about the new leadership of the congregation. It is not appropriate for the former pastor to comment on the “state of the congregation” or to be involved in any way in the selection of a successor, once she/he has departed.

### **To the remaining staff/personnel of the church:**

The former pastor has a responsibility to the remaining staff and personnel of the church at least in the following ways:

- To prepare them for the separation that will occur.
- To encourage them to receive and welcome the interim pastor and the next installed pastor.
- To make clear that he/she will not be available for counsel or advice regarding the life and work of the church.

### **To the interim and subsequent installed pastors:**

The former pastor has a responsibility to the interim pastor (or session moderator) and to subsequent installed pastors to make sure that any requests that come to him/her for services in the former congregation be redirected by the requesters to the interim pastor or installed pastor.

The former pastor should make every effort to be supportive of his/her successor. Pastors should encourage persons who might contact them with concerns about their successor to address them to their new pastor or the Session or the CCD/PCD Committee. Pastors should not draw conclusions about their successor or interpret their behavior and words. They should encourage openness and opportunities for growth.

It is important that, when any request comes to the former pastor, she/he be in touch with the current pastor to let it be known what contacts have been made and that the request was redirected to the current pastor. This is a courtesy which is important to be extended to the current pastor. There should be no pastoral functions of any kind performed by the former pastor without the prior invitation or request of the current pastor and session.

## **Responsibilities of the Session**

### **To the departing pastor:**

Following the pastor's decision to request dissolution of the pastoral relationship, the session can give support and encouragement to the pastor in the implementation of the decision. This can be done by assisting the pastor in interpreting the meaning of the end of the pastoral relationship to the congregation and, it need be, to the wider community. The session should ask the departing pastor to utilize leave-taking liturgies in worship to help the congregation understand and accept the transition.

As a caring expression of closure, it is appropriate for the session to arrange for an occasion when the congregation and pastor may formally say goodbye.

When a pastor departs due to conflict in a congregation, the session, in cooperation with the CCD and PCD representatives, shall negotiate a suitable dissolution agreement and recommend its adoption to the congregation and to the CCD Committee acting for the Presbytery of Des Moines. Since pastors do not qualify for unemployment compensation, this agreement will include a continuation of salary, housing, pension and major medical payments for a minimum of three months, with a normal agreement covering six months. Consideration may be given to length of tenure. This shall apply when there has been no previous dissolution agreement.

When the pastor begins a new call or is employed in a full-time or equivalent position, before the agreement has lapsed, all compensation will cease. If the pastor accepts a part-time position before the agreement has lapsed, compensation will be reduced in an amount equal to the new salary received. All financial support stops after the agreement has expired.

### **To the congregation:**

The session will want to be sensitive to the feeling of loss experienced by members of the congregation while demonstrating through their actions the meaning of the end of the pastoral relationship.

Additional session leadership may be needed in the transition period so that worship, congregational life, and fellowship may continue.

The session can help the members of the congregation by encouraging them to see this time as an opportunity for growth and change. It can be a time for listening to individuals and groups in the congregation. It can be a time for examining present life, ministry, and service, and to be open to new possibilities. It is important that the congregation be prepared for change and for new pastoral leadership.

With the help of the CCD Committee, the session should interpret the role of the CCD Committee during the transition period. This will involve the naming of a session moderator, the process of obtaining an interim pastor, and the process of calling an installed pastor.

### **Responsibilities of the CCD and PCD Committees**

#### **To the departing pastor:**

Upon learning of the pastor's intention to resign or retire, a representative of the CCD Committee shall meet with the pastor to discuss these guidelines. An exit interview will be conducted by CCD before or at the time the pastor departs.

During times of stress or conflict, the PCD Committee will assist the pastor in obtaining any necessary counseling and/or help in searching for a new position.

#### **To the session and congregation:**

A CCD representative will be present at the meeting of the session when the pastor announces his or her resignation. The meeting will include informing the session fully of these guidelines, orienting the session to the transition process and answering questions. A CCD rep will also be present at the meeting of the congregation when the pastor requests concurrence in his/her plans to leave, to inform the congregation of the process for obtaining subsequent pastoral leadership.

When a congregation plans to elect a retiring pastor as Pastor Emeritus, the information in the document that covers that process will be sent to the congregation, and a CCD rep will be offered to interpret the process, if desired.

#### **To the interim and next installed pastors:**

It will be important for the CCD Committee to review these guidelines with the interim pastor and the next installed pastor and to be available for counsel should any difficulties arise regarding relationships with the former pastor.

# Timetable and Guidelines for Resigning Pastors

## **When should the resignation be announced?**

Resignation occurs when a pastor in moving his/her ministry to another location or a different form of ministry. Under normal conditions for leaving a parish, six to eight weeks notice is adequate. This will allow sufficient time for tying up loose ends and for saying goodbye.

Giving notice of more than eight weeks can make for an inordinately long period for everyone concerned having to hold onto grief feelings prior to the final termination, not unlike a prolonged period between a death and the funeral service. However, too short a time between the announcement and the departure is unfair to all affected, especially the congregation. The time after a pastor announces her/his intention to move is a period of extremely important pastoral care, by the pastor to the congregation, and by the congregation to the pastor and family.

## **Whom should be told, and in what order?**

1. Notify the Stated Clerk/General Presbyter and the CCD Chair. They shall maintain confidentiality and will assist/advise in whatever ways are needed.
2. Share the news with your session before sharing it with others in your church or community. Ask them to call a Congregational Meeting to concur with the resignation.
3. The pastor should announce his/her resignation officially and personally at a public worship service. Be positive and open in your announcement.
4. The *Book of Order* requires that you notify the CCD Committee and/or the Presbytery Office in writing of your resignation and the congregational action concurring with your request. The pastor must receive concurrence from the CCD Committee before moving from the parish.

# Timetable and Guidelines for Retiring Pastors

The Board of Pensions suggests that the process of retiring begin six to nine months before the anticipated date of retirement, and so six months notice to the congregation would be appropriate.

Ministers anticipating retirement should request the booklet, *Information for Members Planning to Retire*, from the Board of Pensions. Up to five years before retirement, you should send a request for a pension quote to the Board of Pensions, as well as a request for Social Security benefits quote to the local Social Security office.

Presbytery must certify retirement to the Board of Pensions. Prior to Presbytery action, the PCD Committee will consider the application for retirement. Allow enough time to assure the application can be acted on in a timely manner. The Board of Pensions suggests requesting a retirement application at least ninety days prior to retirement, but a longer time may be wiser. Also, if you elect one of the joint survivor options, the appropriate form must be submitted to the Board at least three months prior to the retirement date.

Six to nine months before the anticipated retirement date, you should contact the local Social Security office to begin the application process for benefits.

## **Additional Guidelines for Retiring Pastors who Remain in the Community**

1. A former pastor who chooses to remain in the area in which he/she has served as pastor needs to deal realistically with his/her own needs for fellowship and church life apart from the former congregation.
2. You and your spouse can be most helpful to your successor and family being accepted in their new situation. You and your family can also be the most difficult problem your successor and family must face. Be sensitive to them and help them in any way you can.
3. A former pastor should refrain from pastoral functions and not accept any position of leadership in his/her former church, nor attend meetings of the session, deacons, or trustees unless invited by the session and moderator of session.
4. A former pastor should not officiate at any sacraments, weddings, funerals, or other functions involving members of his/her former church, or within its properties, unless invited by the session and moderator of session.
5. An invitation to officiate or perform pastoral functions in a former parish is an opportunity to demonstrate your support and loyalty to your successor. Offer to assist rather than officiate. Avoid any functions or requests which will isolate or exclude your successor from the people God has called him/her to serve.
6. A former pastor should avoid formal or informal participation in, or comment on, the work of the Pastor Nominating Committee.
7. If there are options for church membership and participation in another congregation, it is recommended that the former pastor and family become active in the work and worship of another congregation. Remaining in the same congregation can lead to tensions and difficulties which no one intends, but which may not be avoidable.
8. To facilitate the transition by the date of dissolution, the pastor should remove all of his/her personal items from the church and manse (if one is provided). This includes books, apparel, and papers/files. Any keys to the church or property should be given to the person/committee designated by the session to handle church property.
9. Arrangements for payment of any monies due to the pastor (salary, annuities, expenses, etc.) or repayment of any monies owed the church by the pastor shall be made by the effective date of dissolution.
10. The new pastor can do much to prevent difficulties arising because of the presence of a former pastor. The new pastor should remember that the ties that bind the members of a congregation to a former pastor have been forged through the unique experience of the pastorate. The new pastor should recognize that the congregation's affection for the former pastor as an individual does not prevent the development of bonds with the new pastor. The new pastor should refrain from any criticism of the former pastor. This is a time for the possibility of new life and vitality in the church.

Helpful *Book of Order* references:

- Pastor – Dissolution of relationship
- Pastor – Former pastor's pastoral services
- Pastor – Pastor emerita and emeritus

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