



Oregon Synod
Evangelical Lutheran Church in America
God's Work. Our Hands

Moving Toward Retirement

Guidelines for Ministers of Word and Sacrament in the Oregon Synod

Every pastor and lay rostered leader in the synod is challenged to live up to the highest standard of personal, professional, and moral ethics. Rostered leaders are not unaccustomed to the fact that in so doing they will experience tension and ambiguity in their decision-making, relationships, and behavior. These guidelines are offered to help the leadership be aware of the issues, dynamics, and requirements of being faithful stewards of their office.

“Ministers of Word and Sacrament may retire upon attainment of age 60, or after 30 years on the roster of Ministers Word and Sacrament of this church or one of its predecessor bodies and continue to be listed on the roster of Ministers of Word and Sacrament of this church, upon endorsement by the synodical bishop, by action of a Synod Council in the synod in which the ordained minister is listed on the roster . . . (bylaw 7.41.07. in the Constitutions, Bylaws, and Continuing Resolutions of the Evangelical Lutheran Church in America).

From a constitutional and procedural perspective, retirement itself and remaining on the roster of the ELCA as a retired Minister of Word and Sacrament are two different, albeit related, things.

When you retire, you will need to notify Portico by submitting some forms, one of which is to be signed by the bishop of the synod of which you are a rostered member. These forms will change your status with Portico (and, of course, the related benefits) to “retired.” You can get these forms from Portico. **This form and process, however, is not the same as and is distinct from what is described in the bylaw quoted above.** In other words, this retirement with Portico does not automatically keep you on the roster of ordained ministers of the ELCA.

To continue to be listed on the roster of Ministers of Word and Sacrament of the ELCA and the Oregon Synod (or any other synod), and to engage the attendant rights and responsibilities of that status, in advance of your retirement date, you will need to:

1. Review the "Retirement" excerpt from the ELCA Roster Manual included with this memo.
2. Notify the bishop of your desire to retire and invite conversation about that decision and to provide opportunity for the bishop and staff to provide pastoral care for the community or congregation from which you are retiring.
3. Send a copy of your letter of retirement for the congregation to the synod office.

4. Return a signed copy of the form at the end of this document- *Retirement Letter of Agreement* to the synod office.
5. Write a letter (email will suffice) addressed to the bishop and the Synod Council. Include:
 - The request that you be granted retirement status and remain on the roster of Ministers of Word and Sacrament of the ELCA;
 - The date upon which you plan to retire;
 - When and how you plan to inform (or have informed) the community or congregation you currently serve;
 - Your post-retirement plans, such as where you plan to live, congregational membership, openness to various forms of ministry, etc.
6. Get the Acknowledgement of Retirement form from Portico Benefits, complete your portion and the send it to the synod office for the Bishop's signature.

Congregational membership plans are particularly important, as policies for remaining on the roster as a retired rostered leader require membership in an ELCA congregation. It is also important to address the policy's concern that a retired rostered leader "should not remain a member of the congregation served at the time of retirement."

As stipulated by constitution and bylaws, the bishop will decide that the Minister of Word and Sacrament is eligible and then recommend to the Synod Council whether such status be granted. You will receive notification of the Synod Council's decision soon after the meeting at which your request is considered. The bishop's office will also notify ELCA Churchwide offices of the change in your roster status to "retired."

D. Retirement: Policies, Procedures, and Guidelines for Ministers of Word and Sacrament

7.41.07. Retirement. Ministers of Word and Sacrament may retire upon attainment of age 60, or after 30 years on the roster of Ministers of Word and Sacrament of this church or one of its predecessor bodies and continue to be listed on the roster of Ministers of Word and Sacrament of this church, upon endorsement by the synodical bishop, by action of the Synod Council in the synod in which the minister of Word and Sacrament is listed on the roster.

- The policies and procedures for granting retired status on the roster of Ministers of Word and Sacrament shall be developed by the appropriate churchwide unit, reviewed by the Conference of Bishops, and adopted by the Church Council.
- If a minister of Word and Sacrament who has been granted retired status resides at too great a distance from any congregation of this church to be able to sustain an active relationship with that congregation, or if there are no ELCA congregations in the vicinity, other than a congregation previously served, the bishop of the synod in which the minister of Word and Sacrament is listed on the roster may grant permission for the minister of Word and Sacrament to hold membership in a congregation of a church body with which a relationship of full communion has been declared and established by the Evangelical Lutheran Church in America.

7.42. Each person on the roster of Ministers of Word and Sacrament of this church shall be related to that synod:

i. on whose roster the minister of Word and Sacrament, if granted retired status, was listed when last called or the synod of current address, upon application by the minister of Word and Sacrament for transfer and the mutual agreement of the synodical bishops involved after consultation with and approval by the secretary of this church.

1. Policy and procedures related to retired status

- A minister of Word and Sacrament who has attained the age of 60 or who has been on the roster of this church or one of its predecessor bodies for 30 or more years may be granted retired status by this church. Retired status is an ecclesial determination which may be granted by the Synod Council upon endorsement by the synod bishop in keeping with their constitutional authority. Such determinations are independent of the denial or granting of benefits under any health or retirement plan.
- A minister of Word and Sacrament who seeks retired roster status shall make a written request to the synod bishop no later than 45 days following the termination of the most recent call or of on-leave-from-call or disability status.
- The synod bishop shall determine whether the minister of Word and Sacrament is eligible for retired status and whether, in the bishop's sole discretion, to recommend to the Synod Council that such roster status be granted. If the synod bishop does not endorse the request, the bishop shall report the decision to the Synod Council, in executive session if deemed necessary. If the synod bishop does endorse the request, the Synod Council shall determine, in its discretion, whether to grant retired status.
- The synod bishop shall act to provide for appropriate pastoral care of the congregation or for those previously served by the retiring minister.
- A minister of Word and Sacrament who has been granted retired status shall retain that roster status until (1) the minister is no longer on the roster of Ministers of Word and Sacrament, (2) the minister accepts a call, or (3) the Synod Council revokes retired status upon recommendation of the synod bishop. Such revocation of a minister's retired status may occur only upon a two-thirds vote of the Synod Council, present and voting at a legally called and conducted meeting.
- The Synod Council shall engage in a regular, periodic examination of all ministers of Word and Sacrament on the retired roster such that each and every retired minister's status is reviewed at least once during a three-year cycle.

a. Roster of ministers of Word and Sacrament

A retired minister is on the roster of the synod in which last under call or in which the minister resides. The retired minister remains accountable to the synod bishop where rostered, and the minister should regularly report to the synod bishop on any activities as a minister of Word and Sacrament.

Unless bylaw 7.41.07.b. applies, a retired minister must be a member of an ELCA congregation to remain on the roster of Ministers of Word and Sacrament and remains subject to the standards for ministers of Word and Sacrament of this church.

b. Congregational membership

A retired pastor should not remain a member of the congregation served at the time of retirement. Transferring one's membership to another congregation allows the successor pastor to assume pastoral leadership more readily. It also provides an opportunity for the retired pastor to enter fully into the life of a different congregation with clarity about the pastor's retired role.

c. Pastoral service

At the time of retirement, a minister of Word and Sacrament is no longer pastor of a congregation and therefore must discontinue the functions of the pastoral office in any congregation previously served unless specifically authorized to do so. Ministers of Word and Sacrament must respect the integrity of the ministry of congregations which they do not serve as well as the authority of the current pastors of such congregations.

The service of retired pastors is governed by the *Constitution for Synods* [†S14.19.], which describes the role of pastors in congregations in which they do not serve: **“Ministers of Word and Sacrament shall respect the integrity of the ministry of congregations which they do not serve and shall not exercise ministerial functions therein unless invited to do so by the pastor, or if there is no duly called pastor, then by the interim pastor in consultation with the Congregation Council”** (†S14.19. in the *Constitution for Synods*).

d. Interim ministry

One area of potential service for the retired minister is interim ministry. Many retired pastors provide valuable and needed ministry to congregations in time of transition following the resignation of a pastor. The ELCA invites retired pastors to consider this important arena of ministry.

A retired pastor may serve under contract as an interim pastor during a time of pastoral vacancy only upon appointment by and authorization of the synod bishop. Retired pastors who serve under call in an interim ministry return to the active roster of Ministers of Word and Sacrament.

e. Compensation

Retirement benefits provided through Portico Benefit Services, combined with Social Security benefits, are intended to provide adequate compensation to ministers in retirement. Neither retired pastors nor their spouses are entitled to any compensation from any congregation or ministry previously served solely by reason of being retired or having previously served in that congregation or ministry.

f. Consultation with synod bishop

As part of the bishop's pastoral care of retired ministers of Word and Sacrament, a synod bishop or a member of the bishop's staff is encouraged to meet with a minister at the time of retirement to discuss these guidelines, the minister's new retired status, and its implications.

g. Transfer from one synod to another

The transfer of the roster status of a rostered minister who is retired may be authorized upon mutual agreement of the synod bishops involved after consultation with and approval by the secretary of this church.

Pastoral Ethics and Leave-Taking

Toward a Pastoral Ethic Upon Leaving a Congregation

The following draws heavily upon an Alban Institute publication by Edward A. White—Saying Goodbye: A Time of Growth for Congregations and Pastors—a helpful resource for those wishing to review this topic further.

PASTORAL ETHICS

Changing Roles

When a pastor leaves a congregation, members may feel they have lost a trusted friend. Like the eternal presence of God, the presence of God's ministers takes on an aura of permanence, and members are surprised and hurt when the relationship must end. The break is often as hard for the pastor as for the congregation.

It is extremely difficult to shift roles. The pastor ceases to be the pastor and a friend and becomes friend only; members cease being one's flock and friends and become friends only. Relationships must be redefined apart from the ecclesiastical roles. The pain of such change only compounds the sense of mutual loss and grief.

Making Contact

Before a pastor's departure, it was customary for members to seek (and for pastors to give) friendly concern, sympathy, visits, cards, letters, hospital calls, sacramental services, taped sermons, and conversation about the congregation's life and future. After the pastor's departure there is often a persistent tendency to continue these contacts as if to "hang on" to each other and to the good that was. These contacts very often occur in a covert way, as though it is not OK for the new leaders to know about them, since continuing contacts are private matters "just between old friends."

A member in contact with a former pastor, however, generally focuses individually on that relationship and may not see how maintaining that connection affects other members or impedes developing a healthy and proper relationship with the new pastor.

The contact usually takes one of the following forms by retired and former pastors:

- Returning to former congregations to perform weddings, funerals or baptisms.
- Continuing to make pastoral visits on members of the congregation.
- Injecting themselves into the life and problems of former congregations and/or advising members on those issues.
- Criticizing the successor pastor to members of the congregation or becoming the confidant of those who wish to express criticism.

The Problem

The problem may lie in our understanding of the “church.” If the church is centered in the relationship of pastor and people, then it might be argued that a pastor’s congregation is all those people throughout the land who have come to rely on them as their pastor. But if the church is centered in Christ and a pastor is but a servant of that one Lord, then a pastor’s congregation is those who—in this time and place only—have been entrusted to them. It is then an issue of pastoral ethics to fail to recognize that the currently installed pastor of the congregation is the pastor of the congregation and to undermine that person’s ministry is a betrayal of one’s ordination vow and the constitutional requirements of the larger church.

“At the time of retirement, a pastor is no longer pastor of a congregation and therefore must discontinue the functions of the pastoral office in the congregation unless specifically authorized to do so” (On Ordained Ministers: Manual of Policies and Procedures for Management of the Rosters, ELCA, Section III). Furthermore: “A retired pastor should not remain a member of the congregation served at the time of retirement. Transferring one’s membership to another congregation allows the successor pastor to assume pastoral leadership more readily” (Section II).

“Ordained ministers shall respect the integrity of the ministry of congregations which they do not serve and shall not exercise ministerial functions therein unless invited to do so by the pastor, or if there is no duly called pastor, then by the interim pastor in consultation with the Congregation Council” (Synodical Constitution, S14.14).

Effects of Continuing Contact

Consider what happens when a pastor fails to let go of his/her former pastorate:

- Members delay or deny the necessary grief work and get emotionally “stuck.”
- When the congregation must work through a problem, the unseen (or seen) presence of a former pastor complicates the ability to have an open dialog.
- When members turn privately to a former pastor for comfort and care, it deprives the community the opportunity to build the strength that comes from shared struggles.
- Private contacts direct members’ energy outside the congregation when that energy may be needed within the community.
- Private contacts encourage “holding on” to the past and fighting former battles; they decrease the congregation’s ability to struggle with present realities and create a new future.
- Contacts confuse members about where and how to focus their commitment.
- Private contacts place the resident pastor in the awkward position of interloper.
- By surfacing implicit comparisons between new and old, the new pastor is forced to content with “ghosts”.
- Private contacts keep the new pastor on the defensive and subvert that pastor’s morale and effectiveness.

Members are confused. Pastors are hurt. Congregational life may be brought to conflict. And the church’s true passion—which is to be consumed by the mission of Christ—is diverted instead to personal loyalties and relationships. It is clear that former pastors and members need to manage interpersonal contacts appropriately.

When Asked, What Shall I Say?

The request is common enough, and powerful, “Pastor, you baptized and confirmed our daughter, we think it would be so very meaningful if you performed the wedding also.”

Care must be taken not to put the current pastor on the spot (“I’d be delighted to come back and do your wedding if the present pastor agrees”). Instead, the pastor’s response might more helpfully be, “I am honored that you ask, but it really would not be appropriate for me to do the wedding since I am no longer pastor of the congregation. Call Pastor ---; I’m certain he/she will want to celebrate the day with you as your pastor. And I’ll be among your guests that day, celebrating with you too.”

Similar responses can be offered in the instances of illness, sympathy, or death. A former pastor can respond as any congregational member would: sending a card, writing a letter to the family, calling on the phone, attending the worship, visiting the funeral home.

LEAVE-TAKING

It would not be difficult for clergy to develop destructive or negative behaviors in order to defend themselves or to handle the pain of grief and loss. At a time of transition, the pastor may be overwhelmed by feelings of eagerness, anger, or confusion. But publicly wavering on one's decision, or withdrawing the resignation, or being publicly elated at being able to leave, or using the occasion to accuse one's accusers or fault the congregation's circumstances, or "leaving in the dead of night" can easily have the effect of feeding rumors, stunting the congregation's emotional processes, or polarizing the congregation. To give pain to others to ease pain in oneself is not a reflection of Christ's love nor the pastor's vows.

What To Do

Terminating a relationship is not accomplished by an announcement. It is a process—an ongoing sequence of events, feelings, actions, and interactions. Making the decision to leave and announcing it to the congregation is the beginning of the process, not the end of it. The process will continue for the pastor into his/her tenure in the new parish.

The process need not be destructive. The pastor begins by being intentionally and persistently aware of the transitional process and the emotional reactions that accompany it. To do a good and helpful job of "saying goodbye," the pastor needs to be:

- **Spiritually aware:** This is clearly a time to operate out of a rich personal spiritual life. Taking a spiritual retreat, listening for the guidance of the Holy Spirit, asking for ongoing prayer support, studying again the pastoral epistles to find guidance in ministry, or seeking out a spiritual director can be very helpful.
- **Clear about Timing:** Notice of departure needs to be given to the chief lay officer first, then the congregation council, then the whole congregation. Thirty days in advance is adequate; sixty days may be appropriate; six months is too much. Clergy who are preparing to retire may make their announcement of departure earlier, but still not more than four months in advance.
- **In Touch with Their Moods:** Don't be driven by emotions that are beyond immediate awareness and control.
- **Open to Sharing Pertinent Information:** Let the congregation know what is happening and how the busyness of transitioning is going; be open about the ambivalent feelings that may be present.

- **Requesting an Exit Interview:** A pastor can “tie up loose ends” and help a congregation consider its future by offering some careful, thoughtful, and constructive comments about the opportunities and challenges of the congregation in the coming years. To do so is not a boundary violation. A consultant who is a fellow pastor can facilitate the interview and will probably be more objective if he/she does not live in the same community with you.
- **Grateful:** Be thankful in an abundant and honest fashion for the love and support of the people. Accept their appreciative comments and gifts graciously. Maintain integrity and authenticity. Acknowledge accomplishments.
- **Clear About Boundaries:** Maintain appropriate communications but keep them focused on the day-to-day operations of the congregation. Do not attempt to help them initiate a Call Committee or the Call Process. Consider a newsletter to educate the faith community about separation ethics.

Sample Newsletter Article for Congregation

God's Present, God's Future

As you no doubt know, Pr. _____ has felt the call to _____. (retire, take a call in Indiana, etc.) Our prayers and gratitude go with _____ (her/him/them).

Because we want everyone to be aware of some important issues related to the transition between pastors, what experts call “separation ethics,” we ask you to read this carefully.

The Church Council and departing Pastor have agreed to the following, and seek your cooperation, regarding the positive future relationships among us:

We will do everything possible to uphold the mission of the _____ Church and the positive quality of life in this congregation.

We will recognize the need for time to adjust to the new relationships and will reach out in care and compassion to one another.

We will honor the departure of the former pastor so duties may be relinquished.

We will honor the arrival of the interim/transition pastor by acknowledging their role as Minister of Word and Sacrament, and by seeking their counsel and leadership. We are aware that conducting pastoral acts (such as baptism, weddings, funerals, confirmations, communions) and defining ministry programs and leadership styles are no longer the

prerogative of the departing pastor but belong to the transition pastor and newly called pastor with the Council and congregation.

We will, after our interim journey, honor the arrival of the newly called pastor by acknowledging their role as Minister of Word and Sacrament, and by seeking their counsel and leadership. We are aware that conducting pastoral acts (such as baptism, weddings, funerals, confirmations, communions) and defining ministry programs and leadership styles are no longer the prerogative of the departing pastor but belong to the transition pastor and newly called pastor with the Council and congregation.

Termination Tasks

When a pastor says good-bye there are five termination tasks, four of which resemble the task confronting a person near the end of life.

- ☑ **The need to take control of what remains of “this life.”** The pastor needs to be intentional about using the time between the announcement of the resignation and the actual departure to bring closure with the various individuals and groups in the congregation. Saying good-bye may be an almost full-time job for the duration of the pastor’s time in the congregation.
- ☑ **The need to get affairs in order.** Responsibilities must be turned over to others so that the life of the congregation can continue decently and in order.
- ☑ **The need to let old grudges go.** That may mean visiting with people with whom there had been differences at one time or another. The ability to “begin well” (for either the pastor in a new location, or for the congregation with its new pastor) is largely a consequence of having “ended well.” Good closure involves processing the feelings that might otherwise become the emotional baggage of the next relationship.
- ☑ **The need to say, “thank you.”** It is unfortunate that all people so often fail to express appreciation until the end is near. But that is why it is ever so important to at least do it then.
- ☑ **The need to be straight and clear about reasons for leaving.** Nature abhors a vacuum. If a person is not clear about the reasons for leaving, people will fill the vacuum with their imaginations. What they imagine will invariably be worse than the reality and may initiate unfounded feelings or anger or guilt.

LETTER OF AGREEMENT

Some pastors have found that there is great wisdom in helping their congregations be very aware of the way the relationship between pastor and people is changing. The clarity helps in the grieving and healing process and makes it more likely that the congregation will be able to turn in anticipation and readiness for the next chapter of its history. To document and declare the changing relationship, please complete the following letter of agreement in partnership with your Congregation President and submit to the Synod Office at office@oregonsynod.org.

RETIREMENT LETTER OF AGREEMENT

This is a Letter of Agreement at the time of retirement/resignation between Pastor _____ and the congregation council of _____ Lutheran Church, _____, Oregon. It is a clarification of the former pastor's role in relationship to this congregation. It is to be shared throughout the congregation, preferably posted and/or via newsletter, so that others may understand changes in responsibilities and can cooperate together as the congregation and former pastor move into another phase of their respective lives.

1. The pastor's resignation, effective _____, signifies his/her understanding that all pastoral, priestly, and administrative duties in this congregation are terminated as of that date.

2. It is mutually understood that this termination of responsibilities applies also to the interim period before another pastor is called, since the congregation needs some time and space between pastors to discover who they are now, where they want to go, and with what new leadership. It is agreed that the congregation council will make provision with the bishop for interim pastoral ministry for the congregation.

3. The former pastor agrees that he/she/they will not officiate or assist at any baptism, wedding, or funeral in this congregation, but may attend as a worshipper on occasion. This is to prevent divided loyalties in the congregation and pressures on either the former or future pastors or interim pastors. The former pastor may be called on as interim or supply pastor in other congregations on occasion.

4. The former pastor agrees that he/she will not continue to make pastoral visits on members of the congregation. Communications regarding life, illness, or changed circumstances will go through the interim or called pastor. Personal relationships with members of the congregation for any reason will be limited. Circumstances make it necessary for an exception for limited involvement in the following instances:
 - a) _____
 - b) _____

5. The former pastor agrees further that if attending this congregation in the future, it will only be as worshipper and participant and that he/she will neither say nor listen to any uncomplimentary or critical remarks in social or other gatherings concerning the interim, past, or future pastors.

6. The former pastor will not do services (wedding, baptism, funeral, etc.) unless it is at the specific initiation and request of the current pastor and/or council (rather than member).

7. If, after approximately one year, there is a desire on the part of the next pastor to review any of the above items, the former pastor pledges to accept the guidance and instruction of the next pastor and congregation council about any participation in the life of _____ Lutheran Church.

8. The former pastor will remove his/her vestments, equipment, books, and possessions by _____. All items belonging to the congregation will remain in the congregation. Keys to the buildings will be returned to the church office, no later than _____.

9. The former pastor will continue serving in the community in the following capacities:

a) _____

b) _____

"We always thank God, the Father of our Lord Jesus Christ, when we pray for you, because we have heard of your faith in Christ Jesus and of the love which you have for all the saints."

Colossians 1:3-4

Your bishop and synod staff welcome your conversation and concerns as you seek to live a life fully worthy of the calling to which you have been called.

With gratitude for your service and the many ways you to continue to bless God's church and this world.



Bishop Laurie Larson Caesar,
Oregon Synod, ELCA

Retiring Pastor: _____

Congregational President: _____

Bishop: _____

Date: _____