



CLERGY LEAVE-TAKING IN THE DIOCESE OF WESTERN NORTH CAROLINA

July 5, 2016

*Parting is all we know of heaven and all we need to know of hell.
Emily Dickinson, "Parting"*

A good beginning depends on a good ending. Your church's ability to call your successor depends on how well you leave and on your ability to let go. Your character and integrity are demonstrated in how you leave a position.

These are not commandments, rubrics or rules. They are collected wisdom, good practices and occasional humor about an important moment in the life of every ordained person, a moment of celebration, of ending, of beginning, of death, and of resurrection.

First Steps When You Know You're Leaving

1. Inform the Bishop in writing of your leaving. It is preferable that you do this well in advance of the date of your last service, as the Bishop might want to discuss the timing of that with you. Typically, the Bishop advises that you leave 6-8 weeks after giving notice to the vestry.
2. Review the Diocese of WNC policy regarding accrued vacation time and be prepared to give copies to the wardens.
3. Timing for notification is typically as follows:
 - a. On the date of a regular or called vestry meeting, post a letter to the congregation explaining that you are leaving. Send a draft to the Canon to the Ordinary first so a paragraph about the diocese's support can be incorporated. If email is the normal way of communicating with the parish, email the letter the morning after the vestry meeting.
 - b. On the day of the meeting, meet with the wardens in person. Assist them in drafting the letter described under "Communicating Your Decision," below. With the wardens, notify the vestry of your decision to leave. The canons require the vestry to give formal consent of your resignation.
4. Inform the wardens that the canons require the wardens to notify the Bishop in writing that the parish is without a priest. (This may be done by email.)
5. With the vestry, clarify the terms of unused leave or vacation time (see Attachment C), plans for continuing contributions into the Church Pension Fund, and arrangements for insurance coverage. (Be sure that there will not be a lapse in coverage!)
6. If you are retiring, notify the Church Pension Fund, securing the proper forms. The Bishop's signed approval is required for retirement.
7. Schedule a ritual ending of your pastoral relationship within the context of worship. (Refer to the *Book of Occasional Services* for suggestions. In planning this service.)

8. Schedule an ending with parish organizations and staff.
9. Give the Wardens and Vestry, and other leaders as appropriate, a copy of the “Organizing for Your Successor” section of this document and ask for their help in implementing it.
10. Schedule an exit interview with the Bishop’s office, the vestry, and parish leaders. List all your current responsibilities, assigning a hand off date, and designating a specific person to take up that task.
11. If you are retiring, schedule an exit interview with the Bishop. Spouses are strongly urged to attend.

Communicating Your Decision

1. Write a letter to the congregation stating:
 - that you value their friendship and appreciate the time you have had to share ministry with one another;
 - where you will be going and what you will be doing
 - that your decision to leave is not a reflection on their value
 - that changes in clergy is a normal and vital part of the life of a parish
 - that you are confident that they will thrive after you are gone. “The best commentary on a rector’s tenure is how the parish does after the rector leaves.”
 - that the diocese will partner with the parish during the transition and provide support and guidance
 - that after you leave, you will no longer be able to function as their pastor or priest
 - that it no longer will be your role to officiate at their baptisms, weddings, and funerals, regardless of where they take place
 - that you will come back only at the invitation of your successor after the appropriate time away pursuant to diocesan policy; and then you will attend as their former pastor
2. If any of the above is not true, as in the case of an unhappy leaving or a happy leaving after an unhappy tenure, work with the Bishop’s office in drafting your letter to the parish or vestry.
3. Assist the wardens with writing a letter to the congregation that outlines your plan for leaving and assures them that they will have support and guidance from the diocesan staff through the transition. The priest’s letter and the wardens’ letter can be sent in the same envelope, but the wardens’ letter should not be sent first.
4. Make available to the congregation the diocesan Policy on Clergy Leave-taking (attached as Appendix A), and give a copy to each member of the vestry. If you will remain in the community, it is *very* helpful to the parish if you express your support for this policy, regardless of the hardship it might cause you.
5. Notify local ecumenical groups or clergy associations that you are leaving and resign from positions you hold in community organizations.
6. If you hold positions on Diocesan committees, etc., that you will not be able to continue, send notice of your resignation to the diocesan administrator.

Organizing For Your Successor

1. With the wardens, review all leadership positions. Clarify roles and responsibilities.
2. Update job descriptions for paid staff. For each paid staff person, there should be a confidential personnel file containing a job description and all evaluations.
3. Meet privately with individuals with whom there may have been tension or conflict.
4. Be clear about any commitments (baptisms, weddings, funerals) you have scheduled for immediately after your leave-taking date.
5. Review with the wardens and vestry their leadership responsibilities for property, finance, and administration during the transition.
6. Facilities
 - i. Describe renovations that need to take place
 - ii. Make a list of routine maintenance that takes place or needs to
 - iii. Clean the place up. Cut the grass, paint, etc. Get ready for company!
7. Identify those in nursing homes, assisted living facilities, and home bound, noting who expects to be visited and with what regularity.
8. Note significant pastoral concerns such as premarital counseling, pregnancies, divorces in process, terminally ill, and the bereaved, remembering to maintain confidentiality of matters that are pastorally sensitive. This information should be left in writing (in a sealed envelope) for the interim priest and may be delivered by the Senior Warden or by the Canon to the Ordinary.
9. Note preplanned funeral arrangements and where the information is filed.
10. Prepare a calendar for the upcoming year, including Episcopal visitations, homecoming, patronal feasts, sunrise services, graduations, every member canvas, stewardship, and annual meeting.
11. Leave clear instructions about your congregation's participation in community or ecumenical services, as well as their expectations about preaching and hosting future events.
12. Your discretionary fund should be administered by the treasurer. If that is not the case, balance the discretionary fund and turn it over to the wardens. Inform the treasurer that diocesan policy requires that the treasurer or some other person appointed by the vestry is to administer the fund (showing it as a "restricted fund"), respecting confidentiality as much as possible. The interim rector will use this arrangement.
13. Make a list of any special funds, their purpose, use and signatories, including scholarships and other financial commitments.
14. Prepare a file of audits, parochial reports, annual reports, copies of budgets for three years, and by laws.
15. Finances
 - a. Clarify recordkeeping

- b. Make sure audits are up to date and filed
- 16. Identify the location of the safe and who knows the combination.
- 17. Recordkeeping
 - a. Provide an accurate parish list
 - b. Make sure parish registers are up to date and accurate, *i.e.*, baptism, confirmation, burial, marriage
- 18. Work on Memorial Funds
 - i. Review and make policy regarding
 - ii. Explain the difference between endowment and “Board Designated” funds
 - iii. Empower the vestry/committee to reject gifts when necessary
 - iv. Provide role clarification, *i.e.*, who makes policy and who carries it out
 - v. What are the unwritten rules?
- 19. If there is a deacon in the parish, address that person’s effectiveness with the Archdeacon.
- 20. Identify the location of the bank deposit box and who has keys.
- 21. Preserve historic documents.
- 22. Locate your Charter (if the parish has one: parishes in NC do not have to be incorporated) and by-laws. Every parish should have by-laws, whether incorporated or not. If you have by-laws, we suggest that you scan them and put them on your parish website. (By-laws are often misplaced or forgotten.) If you do not have by-laws, leave a note to that effect for the interim. Drafting by-laws may become one of his or her tasks.
- 23. Clean out personal files. Keep what you need and carefully dispose of the rest.
- 24. Prepare a file of service leaflets for the past three years. Prepare a file of Eucharistic Ministers and Visitor certificates, lists of current altar guild members, ushers, acolytes, and servers with contact information (phone numbers and e-mail addresses).
- 25. Describe unique parish customs for the conduct of worship — especially weddings, funerals, Easter, Christmas, Pentecost, and All Saints.
- 26. Prepare a file of current agreements and contact information for all groups that use the buildings.
- 27. Note the location of home communion set, chrism, last year’s palms, the nativity set, etc.
- 28. As a kindness to your successors (whether interim or settled) leave a notebook. Not a ‘how to’ but a ‘where to.’ Where to get good take-out food, get a good haircut, find a dentist, etc.
- 29. Create a contact list of parish leaders including roles and email addresses.
- 30. Turn in your keys, clearly tagged.
- 31. Establish a date certain for moving out of church-provided housing.

32. Encourage and emphasize hospitality for welcoming new clergy and their loved ones.
33. Let people say good-bye, thank you and give you their blessing.
34. Assist wardens in making arrangements for temporary emergency pastoral coverage for the time immediately following your departure.
35. Don't leave anything for the next priest. If it needs to be done, do it! Too many arriving clergy are sunk by things left undone.

Some Additional Suggestions from Interim Clergy

Attached as Appendix B is a list of "Tasks for Preparing to Hand Off" compiled at a meeting of the interim clergy in the Diocese of Western North Carolina. During the meeting, we had a lively discussion of the advisability of getting opinions and perspectives from the leaving clergy, as opposed to formulating those opinions and perspectives on one's own. That, however, should be the call of the new clergyperson, but you should not feel obliged to make any comments if you are not comfortable doing so. Appendix B consists of comments of a more philosophical/systems theory nature. More concrete comments were incorporated into the section above.

Relating After You Leave

1. Arrange for change of address and mail forwarding. Notify those outside the parish of your new email address.
2. After your last day, do not return to the office to check for mail, email, or phone messages.
3. In all cases, the responsibility belongs to the clergyperson who is leaving to make clear that the pastoral relationship has ended.
4. It is expected that clergy will not communicate with former parishioners about matters involving the church and will not discuss church business, especially church "politics," with any members of the church (or anyone else!) for at least six months after the new rector has arrived. The best practice is for clergy who have left a parish *never* to discuss parish politics with parishioners. If the clergyperson has significant concerns, they should be conveyed to the Bishop.
5. If clergy socialize with members of their former parish, it is incumbent on the clergy to let those members know that they may not discuss parish business, and to interrupt and stop any comments that violate that understanding. See the Diocesan Policy on Clergy Leave-taking, attached as Appendix A.
6. Never be involved with the search process, including giving names or offering opinions about candidates.
7. Avoid getting triangulated with members of the congregation and your successor.
8. Make plans to worship with another congregation.
9. In the absence of a rector or interim priest, the wardens are canonically responsible for the worship, finances, property and administration of the parish. They should

look for help from the diocesan staff, not you. Remember, you have no official or canonical role in the parish you leave and your priestly, pastoral, and administrative functions end on the effective date of your resignation or retirement.

* * *

If you have questions, please contact the Rev. Canon Augusta Anderson, Canon to the Ordinary, Diocese of Western North Carolina. canonaugusta@diocesewnc.org.

APPENDIX A **Diocese of Western North Carolina** **Policy on Clergy Leave-Taking**

When a priest (rector, interim rector, assistant, or associate) or a deacon leaves a parish, tensions can arise between, on the one hand, the clergy person's desire to stay in touch with friends whom she or he has known for years and, on the other hand, the need of the parish to make a transition in leadership unhampered by the continuing influence of the former rector, interim, assistant, or deacon. The departed clergy can, even inadvertently, exert a powerful influence that may keep the laity of the parish from establishing the appropriate relationship with the new rector.

While the Bishop is sensitive to the pastoral issues which can arise for a clergy person who leaves a parish, especially if that person leaves to retire, clergy have a duty to serve the best interests of the parish and to follow the pastoral direction of their Bishop.

Priests leaving a parish are not to attend worship or any function at the parish or communicate with parishioners *regarding parish matters* during the interim period or for a period of six months after the new rector has arrived. If the priest wishes to attend his or her former parish at the end of that period, the priest should contact the Bishop. The Bishop will meet with the priest and the new rector to discuss the appropriate course of action for the benefit of the parish. The Bishop may permit the priest to attend services after the six months is up, or may require the priest to stay away for up to one year from the time the new rector arrives.

The policy regarding deacons when a new rector is called is covered in the Deacon's Manual and provides that deacons must be absent from the parish for a three-month minimum. As stated in the Deacon's Manual, a deacon who retires (for reasons other than age) must absent him/herself from the parish for a minimum of six months. Deacons absent from a parish are not to attend worship or any function at the parish or communicate with parishioners *regarding parish matters* during the period of absence.

Clergy leaving a parish (or preparing be absent from a parish) are responsible for making clear to the parishioners that the pastoral relationship has ended and that it will not be appropriate for parishioners to discuss parish matters with the clergy person or to ask the clergy person to function sacramentally (regardless of the location of the service) during this period. When the period is over, the clergy may return to the parish or function sacramentally in the parish only at the invitation of the new rector or, in the case of deacons, as specified in the deacon's Manual.

Clergy who are leaving a parish must schedule an exit interview with the Bishop. The Bishop strongly encourages spouses to attend.

APPENDIX B **Tasks for Preparing to Hand Off**

Compiled by the interim clergy of the Diocese of Western North Carolina

1. Journal what you did in as much detail as you can muster.
2. Write a letter to the next interim/rector:
 - a. Your story of your tenure
 - b. What you accomplished
 - c. Issues you have not gotten to
 - d. Who they need to talk to
 - e. What pastoral situations are "hot"
 - f. "I'm here to talk."
3. Describe how small groups are formed informally, *i.e.*, who is related, etc.
4. Tell who the "uncredentialed" pastors and leaders are in the parish.
5. Who plays the role of:

a. Historian	f. Truth-teller
b. Prophet	g. Savior
c. Gatekeeper	h. Greeter and/or incorporator
d. Nay-sayer	i. Other?
e. Matriarch	
6. Discuss the issues in the parish (but not the people). Address "Untouchable" issues, such as:

a. Meanspiritedness	f. Breaches of confidentiality
b. People who chronically show up to services late	g. Clergy salary
c. People who refuse to understand	h. How clergy are treated
d. Ways parish swamps, ignores, confuses, or discourages newcomers	i. Idolatry regarding buildings, practices, services, etc.
e. Gossip (<i>i.e.</i> , effect on evangelism)	j. The parish's view of stewardship and money
7. Promote a culture of healthy communications
 - a. Openness
 - b. No "triangles"
 - c. Vestry members must speak their minds at the meeting

APPENDIX C **Concerning Accrued Vacation**

One hopes that the leaving priest and the vestry can amicably resolve issues relating to vacation time. If, however, a dispute arises that the parties cannot resolve, the Bishop is the final arbiter.

Beginning in 2014, Letters of Agreement contain the following language, which should resolve the issue:

Although vacation accrues on a quarterly basis, the Rector may take vacation time at any time during the year. If the Rector leaves during the year, the Rector must repay the parish for vacation time taken but not accrued unless the vestry decides otherwise. Similarly, if the Rector has accrued vacation time which has not been taken, the parish must compensate the Rector for that time.

Clergy should consider this provision when planning vacation and leave-taking.

Many Letters of Agreement, however, contain no provisions regarding vacation accrual. It has not been uncommon for disputes to arise when, for example, a priest leaving in July asks to be compensated for four weeks of vacation, or a priest leaving on July 1st takes the month of June as vacation.

In resolving such disputes, the Bishop will consider the totality of the circumstances in order to achieve a fair and equitable result, and there may be times when utilizing the provision shown above would not be appropriate. Clergy should be aware, however, that unless there are mitigating circumstances to the contrary, the Bishop will use the provision shown above for guidance.