



The Diocese of Chicago

LEAVETAKING for CLERGY

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.

This policy is a collection of 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.

Initial Steps

1. If you have decided to retire: inform the Bishop in at least 6 months in advance. Determine the date of your last service. Discuss any ramifications this may have on ordained staff.
2. If you have decided to leave for another position: inform the Bishop in writing at least 3 months in advance. Determine the date of your last service. Discuss any ramifications this may have on ordained staff.
3. Notify the wardens (in person) and with the wardens notify the vestry 3-6 months in advance of your decision to retire, or 1 month in advance of your decision to leave for another position.
4. Canons require the vestry to give formal consent of your resignation.
5. The canons require the wardens to notify the Bishop in writing that the parish will be without a rector or vicar.
6. With the wardens and treasurer, clarify the terms of unused leave or vacation time, plans for continuing contributions into the Church Pension Fund, and arrangements for insurance coverage and secure the approval of the vestry.
7. Notify the Church Pension Fund, securing the proper forms, if you are retiring. The Bishop's signed approval is required for retirement.
8. If you are retiring and remaining in the area, make plans to worship with another congregation.
9. Plan a ritual ending of your pastoral relationship within the context of worship. Refer to the *Book of Occasional Services* for suggestions.
10. Plan an ending with parish organizations and staff.

Communicate Your Decision

1. With the wardens, send two letters to the congregation:
from the rector – a letter expressing your intent to end the pastoral relationship with the parish and gratitude for your shared ministry;
from the wardens – a letter expressing the vestry's plans for leave-taking and the next steps.
2. Develop an agreement with the vestry and let the congregation know, in writing, that,
 - you value their friendship;
 - after you leave, you will **no longer** be able to function as their pastor or priest;
 - it **no longer** will be your role to officiate at their baptisms, weddings, and funerals;
 - you will come back **only** at the invitation of your successor and with the concurrence of the vestry or bishop's committee.

Prepare To Go

1. Schedule an exit interview with the Director of Ministries.
2. Schedule a mutual review of ministry with the vestry and parish leaders.
3. List all your current responsibilities, assigning a hand off date, and designating a specific person to take up that task.
4. With the wardens, review all leadership positions, clarify roles and responsibilities.
5. Update job descriptions for paid staff. Clarify and communicate whether or not current holders will be required to submit letters of resignation, and, if so, by when.
6. Meet privately with individuals with whom there may have been tension or conflict.
7. Be clear with families and/or individuals involved in any future commitments (baptisms, weddings, funerals, etc.) that have been scheduled to take place after your leavetaking date: these services will be conducted by the clergy person in place.
8. Make arrangements for new housing, if necessary. Arrange for change of address, mail forwarding and a new e-mail address, if appropriate. If you have been using parish e-mail for personal correspondence, notify those outside the parish of your new e-mail address.
9. Update signatures on all accounts, security boxes, etc., to remove your name/signature.

Organize For Your Successor

1. Review with the wardens and vestry their leadership responsibilities for property, finance, and administration during the transition.
2. Identify those in nursing homes, assisted living facilities, and home bound, noting who expects to be visited and with what regularity.
3. 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 for the interim priest and may be delivered by the Senior Warden or by the Canon for Pastoral Care.
4. Note preplanned funeral arrangements and where the information is filed.
5. Prepare a calendar for the upcoming year, including Episcopal visitations, homecoming, patronal feasts, sunrise services, graduations, every member canvas, stewardship, and annual meeting.
6. Leave clear instructions about your congregation's participation in community or ecumenical services, as well as their expectations about preaching and hosting future events.
7. Balance the discretionary fund and turn it over to the wardens.
8. Make a list of any special funds, their purpose, use and signatories, including scholarships and other financial commitments.
9. Prepare a file of audits, parochial reports, annual reports, copies of budgets for three years, and by laws.
10. Identify the location of the safe and who knows the combination.
11. Identify the location of the bank deposit box and who has keys.
12. Make sure parish lists and service registers are up to date.
13. Preserve historic documents.
14. Clean out personal files. Keep what you need and carefully dispose of the rest.
15. Prepare a file (electronic and/or hardcopy) of service leaflets for the past three years.
16. Prepare a file of Eucharistic Ministers and Visitor certificates, lists of current altar guild members, ushers, acolytes, lectors and servers with contact information (phone numbers and e-mail addresses).
17. Describe unique parish customs for the conduct of worship especially weddings and funerals.
18. Prepare a file of current agreements and contact information for all groups that use the buildings.
19. Note the location of home communion set, chrisms, last year's palms, the nativity set, etc.

20. Throw away clutter that has accumulated and is no longer in use.
21. 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.
22. Create a contact list of parish leaders including roles and email addresses.
23. Turn in your keys, clearly tagged.
24. Establish with the vestry or bishop's committee a date certain for moving out of church-provided housing.
25. Encourage and emphasize hospitality for welcoming new clergy and their loved ones.
26. Let people say good-bye, thank you and give you their blessing.
27. Assist wardens in making arrangements for temporary emergency pastoral coverage for the time immediately following your departure.

After You Leave

1. After your last day, do not return to the office to check for mail, email, or phone messages.
2. In all cases, the responsibility belongs to clergy leaving to make clear that the pastoral relationship has ended.
3. It is expected that clergy will not communicate with former parishioners about matters involving the church.
4. Never be involved with the search process including giving names or offering opinions about candidates.
5. Avoid getting triangulated with members of the congregation and your successor.
6. In the absence of a rector or interim priest, the wardens are canonically responsible for the worship, finances, property and administration of the parish.
7. 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.

We thank the Diocese of Rhode Island, the Episcopal Diocese of New York, and the Episcopal Diocese of Washington for their Leavetaking resources.

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