

APPENDIX I-B

SEPARATION ETHICS: “ *When Pastor and Congregation Say Goodbye*”

This document describes the process of pastoral transition as “**SEPARATION ETHICS.**” Certain values are important to consider during the often highly emotional experience of the dissolution of a pastoral relationship. Such values include

- effective leadership
- congregational health and stability
- the ability to deal with the pain, problems, and possibilities of separation
- the ability of the Session, lay leaders, and congregation to move positively and effectively into the next chapter of their life together.

Ethical and professional standards should be followed in order to transition from the professional pastoral ties between the former pastor and the congregation. When all parties are intentional about the closure tasks, it helps to create space for new relationships to be established. Because this work has the potential for a variety of difficulties,¹ the following policies have been adopted by the Presbytery of Los Ranchos to enhance the health and well-being of both pastors and congregations during pastoral transitions and to encourage healthy ways for congregations to relate to former pastors.² The following procedures are especially applicable when the former pastor continues to live in or near the community served.

Former pastors are required to follow the procedures set forth in this document and to live within the boundaries of their signed covenantal agreements.

BACKGROUND:

The relationship between a pastor and congregation is often deeply personal, built on an accumulation of shared transitional and transformational times in personal and corporate lives. It has evolved through teaching, preaching, sacraments, wedding, funerals, presence in times of crisis, praying with and for members, counseling, and shared leadership. The pastor has encouraged people in worship, equipped them for tasks, helped bring forth gifts, and prepared them for mission. Through these pastoral relations, there has accumulated elements of trust, confidence, admiration, affections, fondness, respect, and love. Ending such a relationship can be a trying and traumatic experience for both the pastor and members of the congregation. It means CHANGE, which can often be difficult to accept and integrate. The following policies are intended to help all parties say “goodbye.”

SAYING GOODBYE

The departing pastor must make sure parishioners know that her or his relationship as pastor of the congregation is coming to an end. It is essential that parishioners understand this is necessary for the congregation to be free to make the necessary changes in leadership without the departing pastor’s influence. Ordinarily it is the pastor’s responsibility to initiate and lead in this transitional process so that the separation is carried out with foresight and effectiveness. The session and Committee on Ministry also play vital roles throughout this transitional process.

The “Standards of Ethical Conduct for Ordained Officers in the Presbyterian Church (U.S.A.)” are applicable in the transition context, especially numbers 14 to 17.

¹ When the pastoral relationship is dissolved, the nature and character of the relationship changes. Both pastor and congregation must disengage from what was and establish clear boundaries that enable all parties to engage and establish new relationships.

² A “Former Pastor” is one who no longer serves as pastor, associate pastor, or in any temporary pastoral relationship (including Parish Associate) in a congregation once served, due to a call to other service, retirement, release from or termination from ordained office, involuntary termination, or conclusion of contract.

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14. *"I will deal honorably with the record of my predecessor and upon leaving a ministry or office, speak and act in ways that support the ministry of my successor";*
15. *"I will participate in the life of a ministry setting I left or from which I have retired only as directed by presbytery";*
16. *"I will provide pastoral services for a congregation I previously served only as directed by the presbytery and provide pastoral services to members of other congregations only with the consent of their pastor(s); and*
17. *"I will consult with the Committee on Ministry in the presbytery of my residence regarding my involvement in any ministry setting during my retirement."*

- I. **THE ROLE OF THE COMMITTEE ON MINISTRY.** The Committee on Ministry is responsible to oversee the transitional process and to facilitate and coordinate this process with the pastor, session, and congregation following the dissolution of a pastoral relationship. When this is done with sensitivity and pastoral care, it can reduce the anxiety of all parties and help build the foundation for the next chapter in ministry for the congregation, former pastor, and new pastor. To this end, the COM shall take an active roll in all transitions, including implementing the following policies governing the relationship between the former pastor and the congregation.

First Steps: Immediately upon knowledge of a pastor's (impending) departure, the COM shall arrange to meet with the Pastor and Session to introduce these policies and to initiate any actions necessary to meet the requirements of the policy.

- 1.1 **Pastoral letter** A pastoral letter regarding these guidelines and the implications of the changed relationship (especially the need for boundaries) shall be shared with the congregation prior to the departure (**or as soon thereafter as practical**) of the pastor who is leaving or retiring. It is best if such a letter is initiated, written, and presented by the pastor. It shall be read in the worship service as near as possible to the last Sunday the pastor is present and shall be printed in the congregational newsletter and/or distributed to all members.

Sample: "Just as I have cherished the pastoral relationship we have had, I also cherish for you the opportunity to form a new pastoral relationship with those who will fill this position in the future. For this reason, I ask you to respect the professional boundaries of ministry and not ask me to officiate for weddings, funerals, baptisms, to make pastoral calls, or to provide counsel regarding personal situations or the life of the congregation. After your new pastor has been called and been here for sufficient time to have assumed the mantle of pastoral leadership, and if he or she and the session wishes to invite me to participate on occasion in the life of the church, I will gladly do so in support of your new pastor. Please let him or her take the initiative. I want only the best for this congregation and will do all that I can to insure the future health of your ministry and not to weaken the ministry of your pastor. Please continue to honor our respect and affection for one another by honoring these guidelines."

- 1.2 **Remaining in the Presbytery.** Former pastors, who remain as members within the bounds of the presbytery, shall negotiate with the Committee on Ministry a "**Boundaries Covenant**" enumerating acceptable and unacceptable behaviors of all parties (including family members, when applicable). This document shall be signed by the former pastor, Session, and COM. The successor shall receive a copy of this covenant. The covenant shall be reviewed and renewed at least every five years, or whenever there is a substantial change in circumstances. A model for such covenant is provided at the end of this document.

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- 1.3 Continued Care for Pastor Remaining in the Presbytery. When a former pastor remains in the Presbytery, and especially when they remain in the community of the congregation served, the Committee on Ministry shall continue to provide pastoral care for the former pastor, shall insure their continued welcome in the work and ministry of the Presbytery, and shall respect the years of service in the presbytery and former congregation. Committee on Ministry shall actively engage in assisting the newly installed pastor to establish a healthy relationship with the former pastor.
- 1.4 Failing to Honor Covenantal Agreements If a teaching elder, even when retired, fails to honor the practices outlined in this policy and/or will not cooperate with the Committee on Ministry in establishing appropriate and acceptable behavior, the teaching elder may be subject to removal from the rolls of the presbytery according to the provisions of G-2.0509 (“Renunciation of Jurisdiction”).

II. THE ROLE OF THE FORMER PASTOR:

- 2.1 Pastoral Relationship Ends with Dissolution of the Relationship. The former Pastor shall cease all pastoral activity and services in and with the congregation served as of the termination date of their Call.

For this reason, the departing pastor should use every opportunity, prior to the last day of the relationship, to prepare the congregation for separation. This can include sermons, devotions, home visits, newsletters, devotions for meetings, sacraments, etc.
- 2.2 The “No Contact Norm” Former pastors shall not, except as provided in the “Boundaries Covenant,” perform pastoral functions at or for their former congregation until the end of the first year following their successor’s installation. Due care should be taken not to influence, directly or indirectly, through spoken, written, or electronic communication, the selection of groups chosen to nominate a successor, the selection of the successor, or the policies and practices of the successor. The former pastor best honors his or her ordination vows by exercising self-restraint regarding the business and spiritual well-being of the congregation. He/she may maintain friendships³ with members of the congregation but must avoid spoken, written, or electronic conversations regarding policies, practices, people, or programs of that congregation insofar as they might be perceived as attempting to influence decisions or relationships within that congregation. Under no circumstances may the former pastor make public statements or offer opinions critical of the interim or new pastor or pastoral staff.
- 2.3 The “No Triangling Norm” Former pastors should never tell a member of their former congregation that they can perform services only at the request of the present pastor. This places an unfair burden on the current pastor. An appropriate response, firmly communicated, is “*For the continued health of the congregation, it is inappropriate for me to perform any pastoral function now that I am no longer the pastor.*” If they do not accept this answer, it is best to refer them to the Stated Clerk or Moderator of Committee on Ministry for an interpretation of the policy.
- 2.4 Participate by Invitation Only. The former pastor may accept invitations to preach in the former congregation, to assist or substitute for the installed pastor, or engage in pastoral activities **after the new pastor has been installed for at least one year.** If the former pastor is approached prior to contact being made with the present pastor,

³ It is important that “friends” understand that the pastoral relationship has come to an end. It does not mean the friendship has to also. Friendships are priceless and are to be preserved, but the pastor must be clear about the new boundaries to prevent the friendship from becoming confused. No pastoral functioning is appropriate: weddings, funerals, chaplain type hospital visits, baptisms, etc.

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an appropriate response is “_____ (name) is now your pastor. It is inappropriate to continue this conversation until he/she has been consulted.”

[It is incumbent upon the former pastor to notify the interim or successor whenever such a request is received.]

- 2.5 Former Pastor and the Community: By virtue of their profession, interests, and family ties, former pastors may have actively participated in civic, ecumenical, educational, or governmental agencies within the larger community, often serving on boards or volunteering their time. The former pastor may desire these affiliations to continue beyond the end of his/her service to the congregation. Continuing as a member, attending functions as a participant, and/or volunteering in a non-pastoral role are appropriate, provided it is made clear that the former pastor’s participation is no longer associated with their previous position as an installed teaching elder or pastor of a specific congregation. However, given the power of the role and out of respect for the new boundaries that need to be established, former pastors should not, for at least one year after the installation of the new called pastor, perform any pastoral functions or role in the community that would be seen as functioning in a pastoral role **unless provisions for doing so are specifically mentioned in the “Boundaries Covenant” with the Presbytery.**
- 2.6 Pastor Emeritus. When a pastor retires from a congregation, the congregation may bestow upon him or her, the honorary title of “*Pastor Emeritus*” to convey their affection and gratitude. This may be done only after consultation with the Committee on Ministry, is subject to approval by the Presbytery, and takes effect only upon dissolution of the pastoral relationship. Former pastors are reminded that, even in this situation, the pastoral relationship has been dissolved—the relationship to the congregation AS PASTOR has ended and there are no responsibilities, expectations, or privileges attached to this title.
- 2.7 Family Members. Ordinarily, the presbytery has no jurisdiction over family members of the former pastor. However, if tensions emerge between the Session and/or subsequent pastor(s) and the former pastor (including the role of the former pastor’s spouse and/or family in the life of the congregation), the Committee on Ministry shall mediate and may determine it is in the best interests of all parties for the former pastor (and spouse and/or family) to establish a relationship with another congregation. Good judgment and restraint will go a long way toward preventing such situations. If specific concerns need to be addressed, they should be included in the “Boundaries Covenant.”
- 2.8 Former pastors and their family shall have access to the Committee on Ministry to assist in mediating situations where the new pastor is unable or unwilling to relate positively to a former pastor who continues to live in the community.

Special care shall be taken to clarify procedures for mediating any difficulties that MAY arise from behaviors of the former pastor, the new pastor, or the congregation.

III. THE ROLE OF SESSION AND CONGREGATION

With the departure of the former pastor, it is the responsibility of the Session to continue to communicate and interpret these policies to the congregation. This continues even after the new pastor is called and installed

- 3.1 If situations arise where these policies must be applied, the Session is expected to assist all parties in doing so in a fair, compassionate, and pastoral manner
- 3.1.1 This includes arranging for a meeting early in the newly installed teaching elder’s term, including a representative of the Committee on Ministry, to

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review this policy, the Covenant agreement, and the role of the Session in assisting the newly installed pastor in implementing the policy.

- 3.2 The Session It is the Session's responsibility to mediate when the congregation or former pastor does not respect the boundaries established under this policies or the Covenant Agreement. The Session should seek the assistance of the Presbytery and/or the Committee on Ministry in interpreting and mediating such situations.
- 3.3 The Congregation. Until such time as the newly installed pastor has had time to establish his or her leadership role, the congregation should be regularly reminded of the boundaries established under these policies and the "Boundaries Covenant." It is unfair to expect the newly installed pastor to have to interpret or enforce them.
- 3.4 When a pastoral relationship with a congregation ends, there are bonds of affection that continue to be cherished and valued. Friendships continue, but the professional pastoral relationship ends. In order to avoid difficult situations and to encourage the new pastoral relationship that needs to be established, Los Ranchos Presbytery requests that Session regularly remind the congregation of G-2.0905, "After the dissolution of the pastoral relationship, former pastors and associate pastors shall not provide their pastoral service to members of their former congregations without the invitation of the moderator of Session."

Also see "No Contact Norm" on page 3.

IV. THE NEWLY INSTALLED PASTOR

While the above policies are intended primarily to protect the congregation and newly installed pastor from inappropriate and unhealthy relationships with and by the former pastor, it is also incumbent upon the newly installed pastor to recognize the potential benefits of a healthy relationship with a former pastor, especially when that pastor remains in the community. The former pastor has information, relationships, history, and influence that can facilitate the leadership transition when applied in a pastorally sensitive manner. The newly installed pastor is thus encouraged to work with the Session and Committee on Ministry to take whatever steps are necessary to ensure that a positive working relationship is established with the former pastor.