

# Exit Checklist 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.*

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

## Leave-taking Essentials

- Inform the Bishop in writing of your leaving and the date of your last service.
- Notify the wardens (in person) and with the wardens notify the vestry of your decision to leave.
- Canons require the vestry to give formal consent of your resignation.
- The canons require the wardens to notify the Bishop in writing that the parish is without a priest.
- Pray and spend some time with whatever spiritual practice keeps you centered and focused upon God and the fact that Jesus is walking this journey with you.
- With the vestry, clarify the terms of unused leave or vacation time, plans for continuing contributions into the Church Pension Fund, and arrangements for insurance coverage.
- Notify the Church Pension Fund, securing the proper forms, if you are retiring. The Bishop's signed approval is required for retirement.
- Plan a ritual ending of your pastoral relationship within the context of worship. Refer to the *Book of Occasional Services* for suggestions or contact your Diocesan Transition Minister for other examples. Plan an ending with parish organizations and staff.

## Communicating Your Decision

- Assist the wardens with writing a letter to the congregation that outlines your plan for leaving, expresses your gratitude for your mutual ministry and assures them that they will have support and guidance from the diocesan staff through the transition.
- 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; and

- You will come back only at the invitation of your successor; and then you will attend as their former pastor.
- Notify local ecumenical groups or clergy associations that you are leaving and resign from positions you hold in community organizations.

### **Preparing To Go**

- Schedule an exit interview with the Diocesan Transition Minister (DTM) and the wardens and/or vestry and parish leaders. If needed, schedule private exit conversations with the Bishop or DTM.
- List all your current responsibilities, assigning a hand off date, and designating a specific person to take up that task.
- With the wardens, review all leadership positions, clarify roles and responsibilities.
- Make sure you and the wardens/vestry are clear about all financial commitments to each other and how to handle whatever vacation time remains.
- Update job descriptions for paid staff. Thank the staff and pray with and for them.
- Meet privately with individuals with whom there may have been tension or conflict. Pray with them.
- Be clear about any commitments (baptisms, weddings, funerals) that are scheduled to occur after your leave-taking date for which alternate arrangements must be made.

### **Organizing For Your Successor**

- Review with the wardens and vestry their leadership responsibilities for property, finance, and administration during the transition.
- Identify those in hospitals, nursing homes, assisted living facilities, and home bound, noting who expects to be visited and with what regularity. Be sure there is a list of the names, addresses and contact information for all of these.
- 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 appropriate Canon.
- Note preplanned funeral arrangements and where the information is filed.
- Prepare a calendar for the upcoming year, including Episcopal visitations, homecoming, patronal feasts, sunrise services, graduations, every member canvas, stewardship, and annual meeting.

- Leave clear instructions about your congregation's participation in community or ecumenical services, as well as their expectations about preaching and hosting future events.
- Balance the discretionary fund and turn it over to the wardens.
- Make a list of any special funds, their purpose, use and signatories, including scholarships and other financial commitments.
- Prepare a file of audits, parochial reports, annual reports, copies of budgets for three years, and by laws.
- Identify the location of the safe and who knows the combination.
- Identify the location of the bank deposit box and who has keys.
- Make sure parish lists and service registers are up to date.
- Preserve historic documents.
- Clean out personal files. Keep what you need and carefully dispose of the rest.
- 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). Pray with them and thank them for their ministry with you.
- Describe unique parish customs for the conduct of worship especially weddings and funerals.
- Prepare a file of current agreements and contact information for all groups that use the buildings.
- Note the location of home communion set, chrism, last year's palms, the nativity set, etc.
- Take out the trash. Throw away clutter that has accumulated and is no longer in use.
- 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, get ice cream; take a stress reducing walk or jog, etc.
- Create a contact list of parish leaders including roles and email addresses. Pray over the list. Give thanks for your ministry together.
- Turn in your keys, clearly tagged.
- Establish a date certain for moving out of church-provided housing.

- Encourage and emphasize hospitality for welcoming new clergy and their loved ones.
- Let people say good-bye, thank you and give you their blessing. Accept them!
- Assist wardens in making arrangements for temporary emergency pastoral coverage for the time immediately following your departure.
- 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.

### **Relating After You Leave**

- Arrange for change of address and mail forwarding. Notify those outside the parish of your new e-mail address.
- After your last day, do not return to the office to check mail, e-mail, or phone messages.
- In all cases, the responsibility belongs to clergy leaving to make clear that the pastoral relationship has ended. Know your diocesan guidelines about this and convey them to the vestry and congregation verbally and in writing.
- It is expected that clergy will not communicate with former parishioners about matters involving the church and will not meet with any members of the church for any reason during the interim period until new ordained leadership is fully integrated into the life of the church, and then only at the invitation of the new rector.
- Never be involved with the search process including giving names or offering opinions about candidates.
- Avoid getting triangulated with members of the congregation and your successor.
- Make plans to worship with another congregation. Pray and/or seek spiritual counsel about this, especially if you are retiring.
- In the absence of a rector or interim priest, the wardens are canonically responsible for the worship, finances, property and administration of the parish.
- 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. However, you may hold your former congregation and its people in your prayers.

Adapted by the Rev. Thad Bennett from work done by numerous Diocesan Transition Ministers, particularly the Rev. Canon Thomas R. Orso of New York .