

Clergy and Lay Transition
May - June 2018

Good Transitions

Hope Eakins

Israeli anthropologist Yuval Noah Harari proposes that our success as a species arose from our ability to create and respond to change. Neanderthals didn't adapt very well, and they were left behind as the world changed.

Change is often threatening. The church appoints committees and commissions to propose new liturgies. Many of us have seen a new Prayer Book, a new Hymnal and new Bible translations in our lifetimes, yet we often cling anxiously to the old familiar hymns and words. A deacon friend of mine cautions that the seven last words of the church are, "We have always done it that way."

So transitions can be fraught with anxiety and the fear of losing what we love and expect, of what makes us comfortable and lifts our souls to God. But a system that cannot or will not embrace change, like the Neanderthals, is dead or dying. A system that sees possibility and opportunity in times of change is open to new life and new hope.

I think especially of the transitions that occur when parish clergy leave. Both the congregation losing its priest and the priest who is moving on are often fearful of letting go. I have seen this in the parishes where I have served as the interim rector, and I offer the following suggestions for the times when clergy leadership changes.

Five ways a congregation in transition can prepare for the future

1. Trust that God is on the journey with you and that God has something new in store for you. Don't forget to say your prayers and to listen to God and to each other. Continuing to pray purposely and intentionally during an interim period embodies the conviction that you are living out God's word and that you are a part of God's mission.

2. Be adventurous. Try something new and remember that it is only a trial. Have a plan to assess the outcome and be swift to revert to form if the new effort fails. At one parish, as the prayer list grew longer and longer, no one was able to make the hard decision to stop reading through all the names at every service. The interim clergy leader tried variations to make the intercessions briefer and less tedious and also led discussions on intercessory prayer. While one family left because their soldier son's name was not read each week, the endeavor got people thinking and talking about the

purpose of prayer. They began listening to the weekly intercessions rather than tuning out when the long list of names began.

3. Be generous-hearted to the former clergy leader. Praise the good and ignore the bad. Be diligent in following diocesan recommendations about your relationship with the former priest and let him or her go. Both priest and parish need to focus their time and energy on the future and not on the past.

4. Use the interim period to make needed changes in personnel and staff structure so the new rector will not be burdened with staff difficulties. Replace personnel who are not fulfilling job expectations, and eliminate positions that have become redundant. You might consider inviting parishioners to fill in temporarily and serve as trainers. It can extend and invigorate their involvement in the parish.

5. Be there. It's your church, and if you don't support it, who will?

Five ways interim clergy can support a congregation's faith and future

1. Love the congregation with all your heart. Listen to them and pray for them. They are staying; you are not.

2. Be there. The congregation is likely feeling somewhat deserted, so be at as many events as you can. Be a faithful pastor to them.

3. Changes in the worship space are upsetting to folks who have always sat in the same pew. Move the furniture very slowly, and only if it is necessary. Before you make a change, explain what you are doing and why. In one church, a new priest tossed out the stained and frayed cushion that held the altar book, only to learn that it had been made from the vestments of the beloved founding rector. While he was repentant, the damage was done.

4. Be a cheerleader and supporter. Identify and praise the strengths of the parish.

5. You are not there to strengthen a foundation upon which something worthwhile will happen *someday*. You are there to lead the congregation in mission *now*. The parish is living and growing. One of the most attractive things to priests seeking a new cure is a new project begun during the interim. Such an endeavor shows that the parish claims and supports its mission and is open to new opportunities. Small projects can have large impacts. A parish that focused mostly on social justice outside its walls developed an art show to celebrate the talents of the congregation. The fellowship and appreciation that evolved strengthened the parish considerably. Transitions can be important times of joy and camaraderie, of remembrance and gratitude, and of spiritual growth. Have fun. God is with you.

Hope Eakins is a Priest Associate at St. John's, West Hartford, Connecticut. After she retired as Rector of St. John's, Essex, Connecticut, she served as Interim Rector of several parishes and views interim ministry — and all parish transitions — as a time for real growth “in wisdom age and grace” for parish and priest alike.

Resources:

- [Finding Strengths](#) by Richelle Thompson, ECF Vital Practices Blogs, July 17, 2014
- [A Guide for Congregations in Transition](#) by the Episcopal Diocese of Long Island, October 2017
- [Ways to Stay Focused on Jesus](#) by Pat McCaughy, Vestry Papers, November 2007

Would You Hire a Job Candidate with an Unconventional Background?

Nathan Kirkpatrick

[This was first published in Faith & Leadership.](#)

Imagine reading an applicant's cover letter for a senior-level position (maybe bishop, dean, senior pastor, or executive director) that begins this way: "I am an unlikely candidate for this position. I do not have years of experience with a predictable professional background or a conventional skill set for this job. I ask, though, that you see what I could bring to the job -- possibilities beyond predictability, capacities beyond conventions."

What would you do with this letter? With this candidate? Would her candor annoy, disarm, inspire, or intrigue you? Would you set her aside? Would you take a chance—maybe offer an interview to see whether she might be right for the work despite the gaps in her background?

Before you decide what to do with this hypothetical candidate, consider the research of Gautam Mukunda of Harvard Business School in his book "[Indispensable: When Leaders Really Matter.](#)"

By Mukunda's reckoning, 19 of the first 43 presidents of the United States could have submitted a version of this cover letter to the American people in their pursuit of the White House. These 19 ascended to the nation's highest office having spent fewer than eight years in predictable pre-presidential offices (governor, senator, cabinet secretary, military officer), and they had not developed what we think of as conventional skill sets necessary for navigating the sociopolitical structures that define not only Washington, D.C., but the entire country. They were, as Mukunda names them, "unfiltered" presidents; they were not evaluated, qualified, or trained for the office.

Mukunda counts Grover Cleveland, who served as the 22nd and 24th president, only once, and he excludes William Henry Harrison and James Garfield because of their brief tenures in office.

That leaves 21 presidents with more conventional backgrounds. Prior to their election to the White House, each of these 21 enjoyed eight or more years in predictable offices and learned to navigate complicated political systems in generally palatable ways. Even if they were disliked personally, no one was surprised when they assumed the presidency. Mukunda classifies these presidents as "filtered" -- evaluated, qualified and formed for the office.

What makes Mukunda's research intriguing is the relationship he sees between the presidents' backgrounds and their impact, assessed by consolidating historians' rankings.

Mukunda finds that the “filtered” presidents tend to fall in the middle of the rankings.

They led sustainable innovations within systems, while largely preserving the systems themselves. They seldom addressed deep systemic problems in their tenures; after all, they were formed to see the system’s problems as normal. Included in this roster are James Monroe, Ronald Reagan and Bill Clinton.

Unfiltered presidents, on the other hand, tend to fall at either extreme of historians’ rankings (the greatest or the worst).

Because of their backgrounds, they were less invested in systems and institutions as they inherited them, so they were willing to instigate significant systemic change. They upended “the system” through their lack of awareness or lack of care for how the system actually worked. Even within government, they were innovators and entrepreneurs. But Mukunda is clear that while they were transformative leaders, being “unfiltered” did not guarantee that they would lead positive transformation. For every Lincoln or Washington (who count among the greatest) there was also a Grant or a Harding (who count among the worst).

For any who might be worried that Mukunda’s research is too narrowly limited by the presidency and its incumbents, he has applied the same categories to the British parliamentary system as well as leaders in other industries. He observes the same patterns: filtered leaders provide important, institution-sustaining leadership, but unfiltered leaders, unpredictable and unconventional as they are, are the innovators who change systems and have the deepest impact.

Within religious organizations and congregations, there is much conversation about the kinds of leaders that we desire and need for the future. In these discussions, words like *courageous*, *impactful*, *innovative*, and *transformative* appear regularly. What is described as needed are leaders who are dissatisfied with the status quo and its systems, who want to change them and perfect them. The needs we describe are more often addressed by unfiltered leaders.

Yet a challenge for most religious organizations and congregations is that the processes we have in place for filling leadership roles still privilege the filtered. Systems reward those who have been formed in them, who understand them intuitively and can bear their many demands. We have fewer ways of identifying and empowering the many promising unfiltered leaders among us. Even when we do identify them, many organizations have an innate low risk tolerance, and we put limits on their leadership—and their potential.

So we return to our hypothetical candidate.

What would you do? You may have an unfiltered leader who is ready to serve and transform. You may have an unfiltered leader who is ready to demolish and remake.

Either way, it may be worth a phone call.

Nathan Kirkpatrick is the managing director of Alban at Duke Divinity School in Durham, N.C. In this role, he designs educational programs, facilitates leadership development opportunities for clergy, denominational and institutional leaders, works with publisher Rowman & Littlefield to publish Alban books, and consults with senior church leaders around the United States and abroad. He was ordained to the Sacred Order of Priests in the Episcopal Church on Dec. 20, 2015, and serves as assistant to the rector at Church of the Advocate in Chapel Hill.

Resources:

- [Indispensable—When Leaders Really Matter](#) by Gautam Mukunda
- [Let's Hear It From the Other Side](#) by Jay Nord, Vestry Papers, January 2009
- [What We Need Today](#) by Alan Bentrup, ECF Vital Practices Blog, December, 7 2017

Firing an Employee the Right Way

Donald Romanik

The Church is a labor-intensive enterprise. At the parish level, in addition to priests, we commonly hire administrative assistants, organists and choir directors, musicians, sextons, youth ministers, communications officers, and a variety of other professional, administrative and technical staff, both on a full and part-time basis. Most of the time, these individuals are great employees who perform their jobs with competence, passion, and dedication to the church. Without them, we would be unable to live into our mission and ministry as local faith communities, let alone run the day-to-day operations of our congregations.

There are times, however, when a parish employee is unwilling or unable to do the basic functions of the job on an ongoing basis. And in this context I'm not talking about serious misconduct involving finances, violence, or abuse. Those are clear violations that warrant immediate and swift action and often involve the police and other civil authorities. What I'm talking about here is manifested by incomplete or sloppy work, missed deadlines, attendance problems, bad attitude, and/or general poor work performance. Eventually, despite efforts to improve the situation, we need to let the person go.

It's never easy

Terminating an employee is one of the most difficult things we do in the church, and it is often done poorly. For one thing, the work of the church is to nurture and support people, and employee termination seems inconsistent with this basic premise. Another complicating factor is that under the polity of the Episcopal Church, the rector or priest-in-charge is usually responsible for hiring and firing decisions. And let's face it, most priests avoid conflict whenever they can and view firing an employee as contrary to their vocation and calling. The reality is, however, that personnel matters are at the heart of who we are and what we do as a church, and like buildings, property, and money, they are an important part of how we live into our stewardship.

Prior to becoming President of the Episcopal Church Foundation (ECF), I served as a labor and employment attorney for over twenty years, advising and representing employers in personnel matters including employee terminations. My job was to ensure that when my clients needed to fire somebody, they did so in a fair, equitable, and legal way. Over the years as a practicing lawyer, and even in my current role, I have come to realize that the way an organization terminates an employee reflects its underlying purpose, mission, vision, and even its core values. This also applies to the church.

A common church scenario

Here is a common scenario for a congregation confronted with a problem employee who is not performing and may need to be terminated:

1. The rector never evaluates the employee, doesn't talk with him about his shortcomings, and fails to put anything in writing.
2. Because the faith community is 'just too small', there is no employee handbook, manual, or any other formal procedures.
3. The rector doesn't involve the wardens or other key lay leaders in personnel matters.
4. The rector doesn't consult the diocese about the situation. Federal, state, and local laws around discrimination, wage and hour, and other employment regulations are disregarded in the belief that they don't apply to "us."
5. In the end, the rector calls the employee into his office, tells him he's fired, and instructs him not to tell anybody. If anyone asks about the situation, nothing is said as it's a personnel matter.

While there may be a bit of hyperbole in this, it's not far from reality. The situation described above could not only expose the church to legal liability in certain circumstances, it could also be a public relations nightmare. More importantly, botched terminations, especially in smaller congregations, usually have a negative impact on the entire community. Members feel betrayed, lay leaders feel ignored, the terminated employee feels dishonored, and the rector feels isolated. In short, the relationships among and between the entire parish community are breached, sometimes irreparably. I know of several situations where improperly executed terminations have led to irreconcilable conflict that resulted in the involuntary departure of the rector. Clearly, the stakes are high for everyone.

A better way

For the sake of the kingdom we can and must do this better. How can we let someone go with compassion and avoid creating unnecessary conflict? Here are three things to consider.

1. Congregations of all sizes and shapes should have processes and procedures in place that include regular evaluations, ongoing performance feedback loops, and mutual expectations and accountability between the rector and each employee.
2. Human resource management ought to be a regular part of vestry training as well as orientation and continuing education for clergy. Congregations need the ability and capacity to make tough employment decisions in a thoughtful, strategic, legal, and pastoral way.

3. When faced with the decision to terminate an employee, the rector should consult the wardens and other lay leaders—even the diocese, when needed—to reach a decision that all stakeholders understand and accept.

We live in a complex and changing world and church. With diminishing resources, changing demographics, and new models of local ministry, congregations will need a nimble, flexible, innovative, and probably smaller work force. That means developing and implementing sound practices around the recruitment, hiring, retention and, when necessary, termination of church employees.

Donald Romanik has been President of ECF since 2005. Formerly, he has served as an attorney in both government and private practice and has been active in civic, charitable, and religious organizations. At ECF, Donald has stabilized its infrastructure, led a comprehensive strategic planning process, and developed partnerships and collaborations throughout the Church. He is a proponent of lay leadership and the ministry of all the baptized. His book, Beyond the Baptismal Covenant: Transformational Lay Leadership for the Episcopal Church in the 21st Century, advocates for a new type of entrepreneurial priest and effective clergy+lay partnerships.

Resources

- [Well done, Good and Faithful Servant](#) by Lisa Meeder Turnbull, ECF Vital Practices Blog, November 24, 2011
- [Caring for Clergy and Congregations](#) an ECF webinar presented by Donald Romanik, February 12, 2015
- [Wisdom Gathered, Lessons Learned](#) by Loren Mead, Vestry Papers, January 2004

Wellness

Eric Law

In [this video \(https://bit.ly/2jok7YY\)](https://bit.ly/2jok7YY), Eric Law, founder and executive director of [Kaleidoscope Institute](#), talks to us about wellness as explained in his book, [Holy Currencies](#). He says the currency of wellness—fostering wellness in ourselves, our church community, neighborhood, nation, and the earth—is what all of our ministry is about. He explains that Sabbath is the key to wellness and describes two ways to look at it.

First, Sabbath time is the rhythm of work, rest, and play. Second, every so often, we need to press the reset button. According to the Bible, every seven years, we have to start over again. It is important to stop, rest, and gain new perspective.

In terms of lay ministry, Law says we often hear that the same eight people do all the work. Then they complain they are burned out and nobody else is willing to do it. He further encourages every layperson to consider taking Sabbath time.

Law suggests a job description for every volunteer that considers wellness and continuity in the ministry. It might include the following:

- For every year a lay volunteer serves in a position, they must take a month off.
- A lay volunteer cannot have the same ministry for more than three years. They may come back after a year off; they can also serve in a different ministry if they wish.
- The lay leader must train other people to make sure the ministry continues during their Sabbath.

Through doing this, the ministry can be sustainable. Sabbath becomes a way of empowering lay leaders.

How do we help people understand that they need a break? Law suggests having a Bible study and conversations on the topic with the congregation to help people understand the idea of Sabbath and its grounding in theology. Keeping the Sabbath is a commandment, and it is just as important as the others. However, the congregation is seldom upset if the priest doesn't take a day off. "As a culture," Law reports, "we don't value Sabbath. If a priest doesn't take a day off, people say, 'oh, she works so hard, God bless her.'"

Another way to help people understand and value the Sabbath is by having quarterly or, for some jobs, monthly reports on how leaders are doing with their wellness. This should be modeled by all clergy and vestries. This approach has to be relational so people can have honest conversations about their ministry, their wellness, and how the ministry can be sustainable. It is crucial to engage the volunteers in problem solving and in thinking about what God is calling them to do.

Eric H. F. Law, an Episcopal priest, is the founder and executive director of the Kaleidoscope Institute, which provides resources to equip church leaders to create sustainable churches and communities. For more than 20 years he has provided transformative and comprehensive training and resources for churches and ministries in all the major church denominations in the United States and Canada. Visit his blog at ehflaw.typepad.com

The two books quoted in [the video](#) are:

Holy Currencies, Chapter Seven: Currency of Wellness

Holy Currency Exchange, Chapter 87: Holy Currency Job Description

Resources:

- [Eric Law on Wellness](#) Video
- [Kaleidoscope Institute](#)
- [Holy Currencies](#) by Eric H. F. Law
- [And on the 7th Day](#) by Nancy Davidge, ECF Vital Practices Blog, April 11, 2011

Invite the Holy Spirit

Van Sheets

Pop quiz – The leading success factor in a church's rector transition is:

- A. The congregation's transition committee includes accomplished professionals, including some with experience in executive searches.
- B. The bishop has a track record of other parishes in the diocese flourishing since their last rector transitions.
- C. The parish is highly attractive to a wide range of priests.

"A" is not the answer. A pastoral transition involves a spiritual call. In the Anglican tradition and experience the congregation's search committee feels led by God to a particular priest, who, in turn, feels led by God to the parish. This mutual call is the beginning of a partnership in ministry between the congregation and the priest. A few administrative steps in a rector transition have features in common with a search in secular professions, but expertise in those may be as likely to take lay leaders off-track as to help them in the process.

"B" is not the answer. A bishop's support and guidance can be highly valuable, but he or she is sensitive that each parish is unique, and that the partnership between a congregation and its next rector needs to begin with mutual spiritual discernment.

"C" is not the answer. A church may have desirable demographics, a history of dynamic outreach ministry, the best music program in Christendom or a rectory two blocks from the beach. However, these factors do not determine the comprehensive fit between the opportunities of the church at this time in your history and its next rector at this particular stage in his or her vocational life. I am not sure what answer I would have given before I co-chaired our church's rector transition committee in 2015-16. In fact, the leading factor in a successful rector transition is the invitation of the Holy Spirit into all three stages of the process.

In the first stage, the congregation concludes its time with the outgoing rector, aiming for closure that sets the best possible foundation for the church's next years in ministry as well as for the outgoing rector's next stage in ordained ministry. During the in-between stage, lay leaders take larger roles in the church and some of those leaders conduct a search process on behalf of the congregation. In addition, some churches' transitions call for leadership from an interim rector. The final stage is the integration of the new rector into the church and the growth of a partnership between him or her and the congregation.

Three stages, three ways to invite the Spirit into your church's transition

I'd like to share three practical ways to invite the Holy Spirit into a rector transition that may spark ideas that will fit your church. Incidentally, I came to our transition with my experience as a business executive, and I confess that when I first sought advice in [Vestry Papers](#) and other sources, I was seeking practical rather than spiritual advice. Through our transition we realized that, in this process, practical and spiritual are the same.

First, develop a **parish prayer for your transition**. Seek ideas from favorite prayers and from pages 816-18 and page 832 of the *Book of Common Prayer*. We wrote our own prayer, and the congregation prayed it in every worship service during the in-between time of our transition. We established a transition prayer station in our small side chapel where parishioners could light a candle, pray for the transition and take a card printed with our transition prayer. Members of our

church prayed and lit candles there every day from the outgoing rector's retirement to the arrival of our new rector.

Second, the search or discernment committee (or whatever you call your committee) should **go on retreat** together as early as possible in the transition. On our retreat, we opened up to each other and shared who we are as children of God; we did not just share our church volunteer resumes. We bonded in a way that prepared us for a challenging journey of group discernment.

Finally, open and close every meeting of the search committee with **spiritual grounding**. We invited a different parishioner to lead a devotional at the start of every other meeting, and we had a private Eucharist together before the alternate meetings. We ended every meeting by praying aloud our parish's transition prayer. Early in our work together, we agreed that any committee member could call for a prayer break at any time. As we progressed through the last weeks of group discernment, we hit hard emotional moments. The prayer breaks were sustaining and led us to a Spirit-filled conclusion.

Your rector transition will set the trajectory of your church for years to come. Let the Holy Spirit guide you, and your church's potential is greater than you can imagine.

Van Sheets is the author of Rector Transition Handbook, a comprehensive guide for lay leaders that will be published by Virginia Theological Seminary Press in the fall of 2018. He has been an active Episcopal parishioner in four US time zones, including as senior warden of churches in Dallas and San Francisco.

Resources:

- [Healthy Transitions Part I](#) by Sandra Clark Kolb
- [Healthy Transitions Part II](#) by Sandra Clark Kolb
- [Online Book of Common Prayer](#)
- [Build Bonds of Joy in a Spirited Retreat](#) by Donald Peeler

Breathe and Carry On

Meghan Froehlich

Take a deep breath... It's going to be ok... God is with you...

I find myself coming back to these truths often in my work to support congregations and clergy embarking on discerning a new call. Times of transition can be unsettling and anxious; they can also be exciting and invigorating.

The [Office for Transition Ministry \(OTM\)](#) supports the work of congregations, clergy, diocesan staff and bishops during transitions in clergy leadership. The OTM Director and Technical Support Specialist, who make up our staff, are available by email, phone and video conferencing across all

time zones. The most visible part of our work is the Ministry Portfolio, an online resource where individuals and congregations seeking a new call post their information. Clergy use this database to search congregational postings, and congregations use it, assisted by their Diocesan Transition Minister, to explore potential clergy candidates.

Transition in the Episcopal Church is changing rapidly. Even if your parish has experienced a recent clergy transition, the landscape has likely already changed. Ten trends in transition, published in December 2016 by the Board for Transition Ministry, describes that shifting landscape and invites congregations to consider its impact on their local contexts.

Things to keep in mind

Be as clear as you can about who you are when discerning new clergy leadership. It can be a time to consider who you may have become in the last season, who you are being called to be in the next, and where you might want to adjust your direction. This honest self-exploration can help bring clarity about the best fit for your new clergyperson. Take time to say a good farewell to your departing clergy and their household. Look for new leadership gifts among your members.

Remember that “calling” is not “hiring.” Calling a new rector or other clergy is not the same as hiring in a secular job. Your relationship with your clergy calls for mutual trust in places in your lives that are personal and spiritual. Resist the temptation to rush the discernment process, and trust your diocesan staff and bishop. They do this work every day.

It can be tempting to put some activities or initiatives on hold during transition. Parishes that continue to engage in vibrant ministries find they are invigorated and excited about their life and work. Their enthusiasm can attract clergy seeking to partner with a dynamic parish. Ways to remain vibrant during a transition include:

- **Support and build lay leadership:** Everyone is called to ministry in some way. While clergy are ordained for specific roles, we are all in ministry together. Clergy are grateful for partners in ministry, and congregations are strengthened by a variety of leaders.
- **Do enthusiastic evangelism:** Transition is a good time to tell your story! (Well, anytime is a good time to tell your story.) Take this transition as an opportunity to let others know your excitement about your parish and where it is going.
- **Develop — or maintain — an excellent website:** The first place people look, including your next clergyperson, is your online presence through your website. Make sure it shows faces, activities, the diversity of your life and worship. Make it a welcoming online place for visitors.
- **Be connected in your community:** Keep up your community partnerships and nurture the relationships you already have. Seek out a connection with a neighboring congregation, even if simply to ask their prayers for your discernment.
- **Serve through outreach:** Your outreach ministries are crucial in your community. The energy and prayer you devote to them are also a witness for those considering serving as your new clergyperson.
- **Include your youth and children:** Consider ways to involve youth and children in the discernment process and in welcoming your new clergy leader.

- **Work closely with your bishop and diocesan staff:** Your diocesan staff and bishop work with search and call processes regularly, and they are in contact with others working with clergy deployment. They can offer resources and processes to help you find the very best match for your parish.
- **Communicate well:** Keep parish members informed. This helps everyone stay engaged and reduces anxiety. Keeping confidentiality, as needed, is also important.
- **Pray, pray, pray:** While this may seem obvious, nurturing your connection to God through prayer is essential. Listening for and heeding the leading of the Spirit allows for depth and sometimes blessed surprises. God wants to be an integral part of this with you!

One of the joys in our Office's work is seeing how deep prayer, faithful and honest communication and the work of the Holy Spirit result in dynamic partnerships in ministry.

The Reverend Meghan F. Froehlich serves as the Director of the Office for Transition Ministry, part of the Presiding Bishop's staff of The Episcopal Church.

Resources:

- [Ten Trends in Transition](#) by the Board for Transition Ministry
- [Chocolate and Discernment](#) by Steve Ayers
- [Leaving](#) by Anne Ditzler
- [Website Considerations](#) by Kris Lee
- [21st Century Evangelism](#) by Day Smith Pritchartt
- [Welcoming a New Rector](#) by Rich Simpson

Retirement solutions by CPG

Sandra Montes

When my father, an Episcopal priest, started getting ready for retirement, he had many questions but no idea about where to go to find the answers. His first language is Spanish and, although he's bilingual, he prefers "technical" information in Spanish. None of us knew where he could easily get the information he needed in Spanish. His church's vestry was not well-informed, and had no idea of where to find help. Because my work involves finding people who can provide information for ECF's Spanish readers, I understood his frustration and tried to help.

After emails and phone calls over many weeks, I called the Church Pension Group (CPG) at 866-802-6333 and pushed 3 "for Spanish." I wish I had started there. Idania Acosta cheerfully answered my questions expertly and quickly. She told me that there are at least three other Spanish-speakers, and if you need to speak with someone in Spanish, you only need to ask.

What to expect

The main advice Idania gives clergy is to call as soon as they begin thinking about retirement. Because there is a 90-day wait from the day they request their pension to the date they can start receiving benefits, they have to contact the CPG at least three months before retiring. In addition, the application process for retirement benefits takes ten to twelve business days. CPG can provide a checklist describing the steps they must take. She said that CPG can also help clergy who do not know when they will retire.

When clergy call about their benefits and the application process, Idania and the team talk about the Medicare supplement plan that CPG offers. They go over the plan summary, the rates and the priest's eligibility for a subsidy based on credited service. They also review the information CPG has on file, including the caller's personal information and employment history, to make sure it is accurate and complete.

"Sometimes, telling clergy how much credited service they have will be a trigger, and if they think they should have more, we review all their employers," says Idania. They also review the compensation on file to make sure that any increases due are in the system and that all assessments have been paid. And they discuss the services available to clergy once they retire, including investments. She encourages callers to stop and ask questions whenever they want more information on a topic or service discussed. "We are here to serve."

My dad, like a lot of people, had a difficult time picturing himself not working after a lifetime devoted to God's ministry, and I asked Idania what someone who is afraid of retirement or does not want to think about it should do. "Please tell them to call us," she says. "We'll schedule an appointment with a specialist with whom they can discuss everything, including their fears." Larry Dresner and Ana Molin, who is bilingual, provide this service for CPG.

When should I retire?

Whenever you are ready to call to talk about retirement, Idania advises you not to worry about whether or not you know when you want to retire. If you are sure of your retirement date, they will use it to estimate your benefits. If you are unsure, it can be helpful to suggest two possible dates. You'll get two benefit estimates that you can compare to help you make a better decision on when to retire. Idania finds that after seeing the two estimates, clients sometimes decide to work a little longer to increase their benefits.

"We get a lot of calls from people who are not sure about when they should retire," says Idania, "and it doesn't hurt to call, because we can give them the steps they need to take." CPG can even provide benefit estimates that are several years apart. But it's important to remember that when you know the date you expect to retire, you must call them at least 90 days in advance.

Idania said that CPG is translating most publications and forms relating to clergy retirement into Spanish. While they had a lot of the material translated, many changes and revisions to the pension plan take effect this year, so they are busy reviewing, updating and translating them into Spanish.

The first six months after my dad retired were difficult. He did not know where he "belonged" because all of his life as an Episcopal priest he had been vicar or rector of Iglesia Episcopal San

Mateo. There have been many adjustments and tears and laughter. He continues to be invited to serve in several communities, and currently serves as one of the pastors of St. James/Santiago Aposto Lutheran Church in Houston.

You can find more information in this Clergy Benefits Guide in Spanish, updated in December, 2017

Resources:

- [Church Pension Group](#)
- [A Guide to Clergy Benefits](#) in Spanish by Church Pension Group
- [A Guide to Clergy Benefits](#) in English by Church Pension Group
- [Retiring Clergy: Moving On](#) by Tom Martin

No Time to Hibernate

Victor Conrado and Louisa McKellaston

“Transition” can mean many things in the context of congregational life. It typically refers to the process of finding new ordained leadership and everything that happens between the former rector’s departure and the arrival of the new clergy leader. This transition period is often a time when congregations choose to stay the course and ‘hibernate,’ remaining in a comfortable stasis while waiting for the search committee to find a new rector. Actually, it’s an ideal time for increased activity, community involvement and evangelism. During the transition period, a congregation can go back to the basics of who they are and what they are called to do. It can be a time to grow more healthy, faithful and sustainable, to continue to fulfill their calling as the body of Christ in their context and their community.

Take stock, communicate and grow

An interim offers the perfect opportunity to take stock of what works, what does not work and what your congregation might want to try. Having solid, strong and trustworthy lay leadership, is essential. While there may be an interim rector in place, it is important to remember that it is the congregation — not the priest — that is the church. The most important and most valuable gift a congregation can be given at this time is transparency. There must be constant and clear communication from the vestry and search committee to the rest of the congregation at this time. When the congregation knows what is going on, even if details cannot be shared, they have more confidence in their church. More confidence means they’ll feel good talking with friends and co-workers about events and happenings at their church. These conversations build energy and excitement that can lead to inviting others to a church service or event, invitations that inspire community involvement and engagement. Seeing all the good things happening at a church, especially during a search process or transition time, is appealing for newcomers. It’s a good way to make your church a place where people want to be.

When communicating with your congregation during this time, make sure to seek their input as well. Listening to your fellow parishioners and to the community at large, becomes very important. The use of small groups organized by age group, interests, ministry involvement, etc., is a great way to find out what is important to members and why they attend. It is, as well, a tool to help you engage in new and different ways with your local community. The groups are also a way to learn what might need work, what might not be working and what ministries/outreach could be initiated.

Use what you learn to invite candidates—and others—into ministry with you

Critical data you gather from the small groups will inform your search committee as they write the parish profile, OTM (The Office for Transition Ministry) profile and revamp the church website. A transition is the *perfect* time to update the church's website. Usually the first impression a person has of your church, the website should be visually appealing and informative, but not overbearing. Candidates looking for jobs will be examining your profile, OTM and website. Knowing and spotlighting the ministries that are important to your congregation improves the chances that you will attract candidates who share your vision of ministry.

The goal of a transition period is to find a new priest to lead the congregation. Remember that this priest is not coming to create your congregation, but to lead it. Your faith community is constantly in creation and experimenting new ways of being the church. Your new rector is not coming to tell you how to evangelize, you are already doing it. This transition provides an important opportunity to proclaim what you believe in and to invite people to be a part of it. Keep your eye on the smaller goals along the way, and remember that a transition is an opportunity to develop and grow the whole church.

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Resources:

- [OTM Profile Worksheet](#) from the Episcopal Church
- [Beginning the Clergy Transition Process](#) webinar by d'Rue Haze
- [Interview Tool](#)