

Pastor Retirement Guidelines

Lancaster Mennonite Conference

*May 16, 2014 Bishop Board action:
To affirm the Pastor Retirement Guidelines and recommend to congregations.*

Introduction

The following document outlines direction for pastors who are approaching retirement in Lancaster Mennonite Conference.²³ This document has been written with a recognition of Lancaster Mennonite Conference's history and current cultural and theological diversity. No document will sufficiently represent the various ways that leadership has been or is being carried out today—an effort has been made to make the document as flexible as possible in order to be applicable regardless of context. For these and other reasons, this document will be reviewed by the Conference Executive Committee and the Bishop Board within three years, and revisions made as necessary.

Part I: The process of pastor retirement

At and beyond the age of 65, pastors will be expected to have an annual review meeting with their bishop to discuss the status and future of their ongoing ministry. It is expected that a pastor will retire no later than the age of 70 years, but that regardless of the age chosen, he/she will announce their retirement in writing to their bishop at least one year in advance.⁴ Upon receiving written notice, the bishop will schedule a pre-retirement meeting with the retiring pastor and spouse to discuss the retirement process. The bishop will use the following guidelines as a framework for assisting the retiring pastor in making appropriate plans for retirement and in helping the pastor and spouse think through the important details related to retirement. Appendix E provides a checklist of responsibilities and a timeframe for walking through the pastor retirement process.

The retiring pastor will complete a questionnaire designed to address specific areas relevant to retirement (see Appendix A). The bishop and retiring pastor should then discuss the questionnaire responses, and use these responses to guide action steps, develop a timeline, and identify resources for the retirement process. Relevant topics that the mentor and retiring pastor and spouse should address are noted below.

² It is acknowledged that the word retirement does not fully reflect the transition that pastors and others make in stepping away from their role—the idea of “withdrawal” may be too strongly associated with the term. Other words may be more helpful in thinking through the implications of this transition such as “refocusing” or “redirecting.”

³ For guidelines for the retirement of credentialed leaders in Lancaster Conference see Appendix D.

⁴ Any departure from the pastor role before the age of 65 years will be considered a resignation rather than retirement. But the expectations for a pastor's role following retirement (as defined in Part II of this document) are expected to apply to both those who resign as well as those who retire. In other words, it is expected that the agreement found in Appendix B will be written with those who retire as well as those who resign.

Spiritual care

Pastors approach retirement having experienced a variety of spiritual dynamics during their years of ministry. Some will be in need of healing and renewal. Some will need help to realistically embrace the retirement experience spiritually and psychologically. Some will struggle to not only be willing to let go of work but to find a spiritual fulfillment in doing so. Related to this question of resigning oneself to God's purposes in retirement is the inevitable diminishment that comes with aging and retirement and how to embrace this sense so that it serves the pastor and others well rather than creating a profound sense of unresolved loss. Given these various dynamics, it may be necessary for the pastor to be assigned a spiritual director to assist him/her in moving from pastoral responsibilities to other roles.

Physical health

Pastors generally retire at a time when they are likely to have increased health concerns. It is possible that some have not adequately attended to these concerns during the course of their ministry, and it is important that the pastor approach retirement by taking time to assess the quality of his/her health and to begin putting in place (if not already present) appropriate preventative health measures. Actions such as scheduling a physical and age appropriate testing are both important steps.

Emotional/psychological well-being

The psychological challenges of retirement are well-documented and have effects on physical health, relationships, continued career plans and more. It would be wise for a retiring pastor to assess his/her emotional well-being as he/she approaches retirement, and consider making an appointment with a mental health provider to discuss the challenges and opportunities he/she faces. Credentialed leaders of Lancaster Mennonite Conference are eligible to receive three free LAP counseling sessions at Philhaven.

A central question for most retirees has to do with their continued identity following retirement. The question of "Who am I?" is typically part of the transition from the work-a-day world to retirement. Our occupational roles tend to structure our time, are context for conversation with others, occupy our minds when relaxing, and provide significant meaning. The absence of such roles leads to questions such as "What meaningful contribution am I making? Who are my friends? How should I schedule my time?" Waiting until retirement to address such questions is waiting too long—the question of identity discovery should be part of the journey toward retirement for every pastor.

Besides identity, the opportunity to meaningfully assess one's emotional well-being should help to create space for grieving the loss one feels in saying goodbye to an identity, to colleagues, to

an office space, etc. Grief is a natural part of retirement for most persons, and acknowledging it will aid in transitioning into retirement.

Living arrangements

Retirement may be an important time for a pastor and spouse to think reflectively about their current residential status. Perhaps it would be a timely opportunity to move into a retirement setting or to downsize. Perhaps moving outside of the district where one served would also be a helpful consideration. Whatever the case, retirement provides an opportunity to address one's long-term residential plans. While in some cases this may be wise, in other cases, this question is complicated by the location of the retirement community of their choice lying within their geographic area of service, by having recently moved closer to family who live within their area of previous service, or by serving in a conference-wide or denomination-wide capacity.

Finances

Throughout their lives, pastors will have been compensated by their congregations and districts in a variety of different ways, and some are more prepared financially for retirement than others. It is important that pastors are provided with financial guidance as they move toward retirement, receiving financial counseling from professional financial planners. Just as Philhaven may be able to provide counseling services, perhaps Everence could be asked to offer financial planning for retiring pastors. Or as an alternative, Lancaster Mennonite Conference could schedule a time to meet with an Everence financial advisor to assess the pastor's financial health at retirement, with all expenses for the assessment paid for by Lancaster Mennonite Conference.

The pastor's spouse and family

It is often the case that the spouse of the retiring pastor has sacrificed significantly in order to support his/her spouse. It is important that the couple use the onset of retirement to have honest discussions about the future of their relationship, and how they can best maximize the years of health that remain. Questions such as: Does the pastor's spouse have goals he/she wants to achieve in these retirement years? Are there activities or plans that he/she has put on hold to support his/her spouse that they now need to consider carrying out? What needs does the spouse have as the retirement of his/her spouse approaches—needs in terms of physical health, emotional well-being, meaningful work and identity? The bishop should not just assume that these conversations will occur between husband and wife, but rather offer to facilitate them and to support both retiring pastor and spouse as they discern God's plans and purposes for their lives.

Besides addressing the spouse's needs at retirement, it is also critical that the couple reflect on their relational identity, and on new ways to cultivate their relationship (or "we-ness") as a retired couple. Retirement represents a tremendous opportunity to nurture a stronger relationship and to develop increased intimacy as they move into their senior years. A marriage therapist may be an important asset for the couple at this season of their lives.

Finally, the couple's children and grandchildren (assuming they exist) should also be considered in the retirement transition. It is possible that they have expectations of how their parents' retirement might affect them—perhaps with greater expectations of time together, etc. A conversation with extended family is also an important consideration for the retiring pastor.

The congregation

Just as the pastor needs to address his/her retirement in a systematic and healthy way, so the local congregation needs to be proactive in developing steps to recognize the contributions of the pastor while also thinking about its future after the current pastor's retirement.

Helping the congregation to let go. It will be useful for the congregation to have ample time to adjust to the pastor's pending retirement. The congregation should be adequately informed of the pastor's retirement and be provided with sufficient information to process this in a healthy way. It may be important for the bishop to create a space for congregation to process any emotions—including grief—that they have about the pastor's retirement.

While it is important for the congregation to symbolize the end of its relationship to the pastor, it is also important for the pastor to find ways to symbolize awareness that former relationships and roles will be forever different. Following retirement he/she will no longer relate as a pastor to the congregation. While the recognition of separation is painful at times, it is necessary in order to develop new parameters that will support the relationship of the congregation to its new pastor.

Saying farewell to the pastor, spouse and family. At a minimum, a service of recognition should occur in the congregation in which the pastor and spouse are honored for their years of service. A gift from the congregation is also a thoughtful way to honor the pastor and spouse.

The Retirement Agreement

It is important that the retiring pastor, congregation, and Lancaster Mennonite Conference mutually understand and agree to the conditions of the pastor's retirement. As a result, a

written agreement will be signed by the retiring pastor, the current congregational pastor (if applicable) the bishop and congregational Board Chair (Appendix B).⁹

Role in home congregation

Many denominations require retiring credentialed leaders to leave their place of ministry as they transition to retirement. This is also the official recommendation of Mennonite Church USA, though Lancaster Conference has allowed some flexibility among its credentialed leaders in this regard. For pastors, it is may be wise to worship outside of a congregation where one had been pastor. Although the retiring pastor may feel that he/she is capable of remaining in the congregation without interfering with congregational life, this is inevitably a challenge.¹⁰ At the same time, the home congregation may be a place of wholeness and health in a challenging time of transition. If the pastor desires to remain in his/her home congregation, it is important that a conversation among the congregational leadership, the bishop, as well as the retiring pastor lead to a mutually agreed upon decision in writing as to where and under what conditions the retiring pastor will continue to worship and serve there.

Conclusion

The purpose of this document is to strengthen pastor transitions, particularly pastoral retirements. While no “cookie-cutter” approach will do for every pastor retirement, this document suggests several principles that are important and it is expected that congregations, pastors, and bishops will attempt to use these principles to encourage a healthy pastoral transition. It may be that additional steps or initiatives will be identified by others that can be added in the future.

⁹ The bishop is responsible for seeing to it that this document signing occurs.

¹⁰ While many denominations, including Mennonite Church USA, require credentialed leaders to relocate to another congregation following retirement, Lancaster Conference has made exceptions to this policy given the history of leaders emerging from and serving in local congregations and districts for much, if not all, of their lives. Requiring the pastor to leave his/her home church could lead to an even greater sense of dislocation than is already the case. As a result, Lancaster Mennonite Conference issued a statement in 2007 which described its historic pattern of allowing retired credentialed leaders to remain in the congregations they served.

Appendix A

Pastor Retirement Questionnaire

Once a pastor commits to a retirement date, he/she will meet with his/her bishop to complete the following questionnaire (in writing) and to discuss. Using this as a guide, the pastor and bishop will develop a series of action steps and a timeline to address issues raised by the following questions.

1. As you have considered retirement, what have been the major factors that have contributed to your decision? That is, why have you decided to retire as pastor at this point in your life? How have you seen God's direction and understood his will in this decision-making process?
2. What process to date have you followed in discerning your retirement decision? From whom have you sought counsel, and what have they shared with you? How does your spouse feel about this decision? Are there any remaining questions or concerns in your mind about your decision that should be further processed with anyone?
 - a. Action steps
 - b. Timeline
 - c. Resources needed
3. As you consider retirement, do you have specific plans for meaningful work and purpose? That is, have you considered the nature of your "identity" once you retire as pastor? Do you expect or desire to continue your involvement in some kind of ministry role? If so, what if anything, you have considered doing?
 - a. Action steps
 - b. Timeline
 - c. Resources needed
4. How would you describe your health at this point in your life? Are there any major health concerns that you or your spouse face as you enter retirement? If so, what supports, if any, do you have in place to assist you with these needs?
 - a. Action steps

- b. Timeline
 - c. Resources needed
- 5. Do you have plans as to which congregation you will attend once you are retired? Have you and your spouse discussed where you both feel most comfortable belonging?
 - a. Action steps
 - b. Timeline
 - c. Resources needed
- 6. What would be most helpful for you in receiving support from your district? From your perspective, how might the district most appropriately acknowledge your service and release you? Do you anticipate any challenges on your part or on the district's in disconnecting in a healthy way from one another?
 - a. Action steps
 - b. Timeline
 - c. Resources needed
- 7. What, if any, psychological implications do you expect retirement to have upon you? Have you considered the possibility of depression or other emotional responses that may emerge as you enter retirement? If these presented, how would you anticipate responding to them? Do you have a mental health provider that you could turn to?
 - a. Action steps
 - b. Timeline
 - c. Resources needed
- 8. What have been your spiritual practices to date? Which of these have been most meaningful, and how do you imagine your life with God being strengthened as you enter retirement? Have you considered a spiritual retreat or connecting with a spiritual director?
 - a. Action steps

- b. Timeline
 - c. Resources needed
- 9. What plans, if any, do you have for celebrating your years of ministry and God's faithfulness in your life? Have you and your spouse discussed a vacation to celebrate? Might you consider a party of friends and family?
 - a. Action steps
 - b. Timeline
 - c. Resources needed
- 10. How would you describe your financial condition at this time in your life? How, if at all, have you prepared financially for retirement? Would you be willing to talk with a financial advisor?
 - a. Action steps
 - b. Timeline
 - c. Resources needed

Appendix B

Retirement Agreement¹²

We believe that God called us together when the _____ (name of congregation) installed _____ as their pastor.

We believe that God calls to new ministries, including those in retirement, that require the dissolution of pastoral and oversight relationships. Thus, it is appropriate that the _____ (name of congregation) dissolve the ministerial or formal or official working relationship between itself and _____ effective _____.

We believe that it is God's will that this congregation, and its new pastor, be free to move forward in Christ's ministry, able to establish new bonds and experience new ministry and styles.

We believe the reign of God among us is diminished if the parties above were to give any time to making or listening to uncomplimentary or critical comments or comparisons of pastoral leadership. Therefore, In order to honor God's call, will and reign, we establish this Agreement to assist each other in observing the following commitments and agreement:

Prior to leaving, the retiring pastor, together with his/her bishop, will send a letter to the congregation stating that he/she will be retiring. The letter will request that the congregation not ask the retiring pastor to officiate any services or to be involved in the congregation in any leadership role after the date of effective retirement without the invitation of the new pastor. Those who wish the retired pastor to be involved in funeral or other services are to make this request through the current pastor rather than to go directly to the retired pastor.

The retiring pastor will never initiate involvement in the affairs and business of members in his/her former congregation unless invited to do so by the current pastor, and such involvement will be guided by a written agreement formulated by the bishop.

The retired pastor will not engage in negative or critical conversation about his former congregation, its pastors, or the bishop.

The congregation agrees that during the final month of the pastors's ministry the congregation will carry as much of the administrative responsibility as possible to enable the pastor to prepare for leaving.

¹²This document is expected to applied in the cases of pastor resignation as well as retirement.

The pastor agrees that by the retirement date above, all funds, keys, papers and documents that may be considered the property of the congregation, and all other property belonging to the congregation will be transferred to the congregation.

Retiring pastor

District bishop

Church Board Chair

Congregational pastor (as applicable)

Date

Appendix C

Guidelines for when the former pastor remains in the congregation

If a former pastor continues in the same congregation he/she should be in dialog with the conference overseer, conference minister and the current pastor. The former pastor should exercise great sensitivity to the current pastor. The continual reappearance of a former pastor at crisis points or life transition points interferes with the normal development of the relationships between the current pastor and members.

For clear lines of accountability and ethical responsibility of former pastors, the following guidelines are given:

- Pastoral care and crisis ministry is now the responsibility of the current pastor. Former pastors should not continue pastoral visits or respond in crisis ministry situations in place of the current pastor.
- Former pastors will decline invitations to perform baptisms, weddings and funerals and will defer these requests to the current pastor. The best pastoral care given by a former pastor is to attend the event rather than exercise public leadership.
- Former pastors should not accept any position in the congregation that by virtue of office puts them on the church council or the pastoral leadership group. Other assignments may be considered if approved by the pastor and congregational leadership persons.
- Former pastors should develop and maintain an open relationship with the current pastor. Do not rely on assumptions.
- Recognize and respect the fact that as former pastors you continue to have significant power. The issue is how that power is used or abused. Former pastors must never allow themselves to become the rallying point for discontent
- If the former pastor is not comfortable with new directions and efforts that may well come with a pastoral change, resist the temptation to protect or rescue a program or an idea. In such a case it is better to move on and entrust the congregation to God's grace.
- An accountability group of overseer, elders and current pastor will be formed to answer any questions former pastors may have about their role and to discuss any perceived inappropriate behavior in this regard. It is the responsibility of the overseer to see that this group is in place. (see *The Mennonite Polity for Ministerial Leadership*, page 118, #8)

Adapted from A Polity for Ministerial Leadership, (Faith and Life Press, 1996, pages 118 and 119 and "Is Retiring From the Pastorate Within One's Own Congregation An Option?" by Earnest D. Martin, Leadership Commission of Ohio Mennonite Conference, March 1992.

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Appendix D

Transfer of Responsibility Retirement Policies

- 1. Retirement** For reason of age, illness, or possible declining efficiency, persons who are ordained should retire or be retired from active responsibility in their offices.
- 2. Definition** Retirement is the easing or eventual full relief from the ordinary responsibility of an ordained person.

Retirement is not intended to change the status of ordination, nor to close opportunities for a continuing ministry suitable to their abilities. Conference and congregations should utilize in some form of Christian service the gifts, experience and God-given talents of faithful ordained workers who have reached the age of retirement.
- 3. Age**
 - at 65 years** Should begin to make arrangements for assistance and transfer of responsibility using the regular channels and methods currently used in choosing bishops, ministers, and deacons.
 - at 70 years** Should retire from official responsibility and turn responsibility over to a successor, unless conference, supervising bishop, or congregation ask them to continue in these responsibilities for a stated length of time.

Approved by Board of Bishops; January 15, 1981

Appendix E

Pastor Retirement Checksheet

- _____ Pastor announces retirement in writing to the bishop at least one year in advance of retirement.
- _____ Bishop schedules meeting with retiring pastor and spouse to discuss shared expectations and timeline for meeting and completing the retirement process as described in the Pastor Retirement Guidelines
- _____ Pastor and spouse complete Pastor Retirement Questionnaire
- _____ Bishop schedules meeting to discuss Pastor Retirement Questionnaire and to develop a plan for addressing any needs that emerged in its completion and follow-up discussion including the following possibilities:
 - _____ Locate a spiritual director
 - _____ Schedule a physical
 - _____ Schedule initial LAP counseling session at Philhaven
 - _____ Schedule meeting with Everence advisor
- _____ Bishop oversees the signing of the Pastor Retirement Agreement and sees to it that this agreement is honored through the retirement process.