

RELATION OF FORMER PASTORS TO CONGREGATIONS

Guidelines Between Departing Pastors, Incoming Pastors, Pastors Succeeding Pastors (both installed, temporary pastoral positions, and commissioned ruling elders), and their Congregations

(Based on G-2.0905)

Commission on Ministry, Presbytery of the James

PURPOSE

Pastoral transitions represent key milestones in the lives of the departing pastor, the congregation, and the new pastor, and care must be taken to ensure these transitions are as successful as possible for everyone involved. As such, the Commission on Ministry (COM) has developed this policy to assist both the pastors and the congregations at this critical time of change. *The primary goal of this policy is to provide the incoming pastor and the congregation with the appropriate opportunity to establish healthy new pastoral relationships, while extending grace to the outgoing pastoral relationship.*

I. TRANSITIONS COVERED UNDER THIS POLICY:

This policy applies when an installed pastor, interim, covenant, called designated pastor, or commissioned ruling elder (CRE) departs a position and that position is being filled by a newly installed pastor, temporary pastor or commissioned ruling elder not currently called to or employed by the same congregation.

II. POLICY DEFINITIONS:

Within this document a “pastor” refers to any installed pastor/associate pastor, pastor/associate pastor in a temporary role, including covenant pastor/interim pastor, and commissioned ruling elder (CRE).

III. POLICY SUMMARY:

This policy and set of ethical guidelines offer the Presbytery of the James (congregations and minister members) understanding and interpretation for the implementation of G-2.0905: *After the dissolution of the pastoral relationship, former pastors and associate pastors shall not provide their pastoral services to members of their former congregations without the invitation of the moderator of session.* As such, these policies are designed to assist pastors and church members in developing and maintaining relationships that respect appropriate professional boundaries and promote healthy transitions of pastoral leadership. This policy is also intended to guide and support both former and new pastors as they seek to uphold their ordination vow to "...be a friend among [their] colleagues in ministry, working with them, subject to the ordering of God's Word and Spirit," (W-4.0404e).

Upon dissolution of the pastoral relationship, the departing pastor shall cease performing all pastoral functions in the church, except when invited by the current moderator of session. In

addition, the departing pastor shall not participate in the life and work of the church from the time of their departure until at least one year following the installation of a new pastor, or at least one year following a decision by the Session to seek pastoral leadership other than a traditional installed position.

The COM can grant exceptions to the one-year period in instances of extraordinary circumstances (see section VII). The ethical guidelines (see Appendix B) advise pastors on educating congregations on appropriate boundaries, friendships with church members, property issues, and handling requests from church members for pastoral care.

IV. POLICY GUIDELINES

- a. On and after the effective date of the dissolution of the pastoral relationship between a pastor and a church, the pastor (a) shall not perform pastoral functions in the church, except when invited by the moderator of session and (b) shall not otherwise participate in the life and work of the church for **at least one year following the arrival of the new pastor unless authorized to do so in writing by the COM.**
- b. Note: "*Life and work of the church*" means all activities by the congregation as a whole or by organized groups within the congregation. Included in this term are worship services, church school classes, Bible study, social gatherings, fundraising activities, choir rehearsals and presentations, meetings of committees, and other congregational groups, mission and service projects, and all seminars, lectures, and forums. NOTE: "*Life and work of the church*" does not include routine expressions of personal concern or celebration such as notes or tokens of condolence or congratulation and attendance at weddings, and funerals for church members.
- c. Nothing in this policy prevents a congregation from conferring on a pastor the honorary relationship of pastor emerita or emeritus, no sooner **than one year following the arrival of the new pastor.** However, the COM will approve the establishment of such a relationship only if the congregation's request is accompanied by the pastor's written agreement to comply with this policy.

V. CLERGY-COUPLE SITUATIONS

- a. These situations introduce even more complexity into pastoral transitions when one member of the couple is leaving a called position and one is staying. Sensitivity to the nuances of these situations must be applied in order to enhance the long-term success of such transitions.
- b. The same policy elements apply to the departing member of a clergy couple, including the cessation of all pastoral functions. The departing pastor must also remove themselves from any formal leadership position in the church during the transition period, and to the extent possible, should separate themselves from the life and work of the church as well. However, it is clear that in some cases refraining from all aspects of church life/work is not possible or practical and might be unhealthy when young children are involved.
- c. Because it is not possible to articulate specific exceptions for every clergy-couple situation, the COM requires the departing pastor to engage the session and the COM at

the beginning of the transitions process to gain consensus on the appropriate degree of engagement (if any) during the transition period. The COM will strive to achieve the goals of this policy with love and care, affirming the unique needs of the clergy couple.

VI. CONSIDERATION OF EXCEPTIONS

- a. The COM shall authorize a former pastor's continued participation in the life and work of her or his former church without the transition period provided under Section IV only when the pastor's departure will place an extraordinary burden on the pastor or the pastor's spouse/partner. For the purposes of this determination, "extraordinary burden" is defined as physical, emotional, financial, or spiritual difficulty that exceeds in intensity or scope the stress or challenge ordinarily associated with life transitions such as retirement or moving to new employment. The COM emphasizes that approval for a former pastor to participate in the life and work of the congregation does not change the importance of the pastor's compliance with Section IV. **The former pastor shall cease performing all pastoral functions.** The COM will scrutinize any request for exemption from Section IV. The COM will establish such conditions as necessary to make certain that the transition period proceeds smoothly, and the congregation and the new pastor are provided an opportunity to develop a healthy and productive relationship.
- b. Among the factors that may be considered by the COM in authorizing a former pastor to continue to participate in the ongoing life and work of her or his former church are the following:
 - The health of the former pastor and/or spouse;
 - Availability of reasonable alternatives for church involvement;
 - The circumstances surrounding the dissolution of the pastoral relationship;
 - The overall health and welfare of the congregation.
- c. The COM may establish conditions for a former pastor's continuing involvement in a church following dissolution of the pastoral relationship. Examples of such conditions include:
 - The former pastor's agreement to decline leadership roles in the church's services or services for the church's members,
 - Departure from the congregation for an established period; and,
 - Limiting the scope of the former pastor's involvement to attendance at worship services and other specific activities.
- d. All authorizations for a former pastor's continuing involvement will be in writing and acknowledged by the former pastor's signature. Copies of the authorization will be provided to the church's clerk of session, the former pastor, interim pastor and the new pastor. A copy will also be sent to the Presbytery Office and filed.

VII. NEW PASTORS

The COM reminds new pastors that extending an invitation to the former pastor to participate in services or continue to be involved in the life and work of the church may not be in the best interest of the church or the new pastor. New pastors should consider any decision on this issue very carefully and should engage the session and the COM to gain consensus on the appropriate degree of involvement, if any. Similarly, the new pastor should notify the COM and the liaison if a situation develops involving the former pastor that the new pastor believes has the potential of causing disruption. In some situations, such as when a retired pastor

remains in the presbytery, it may be beneficial for the new pastor to initiate contact with the retired pastor as a sign of collegiality, conveying gratitude for the retired pastor's ministry, listening to the retired pastor's memories, and expressing appreciation for the retired pastor's compliance with this policy.

VIII. ROLE OF PRESBYTERY AND THE COMMISSION ON MINISTRY IN POLICY IMPLEMENTATION

- a. *Supporting the Departing Pastor.*
 - i. Upon learning of a pastor's imminent departure from a congregation, the appointed liaison will review with the pastor and session this policy, along with the Covenant of Closure, on their relationship with the congregation after departure.
 - ii. A representative of the COM will consult with the departing pastor to determine what resources are necessary to meet the spiritual, emotional, and physical needs of the pastor and their family during the transition period. The COM liaison will assist the pastor in securing those resources.
- b. *Educating the Congregation.*
 - i. In the case of an Installed Pastor: It is vital that the Session of the departing pastor educate the congregation of this policy. This policy shall be communicated to the congregation following the congregational meeting to dissolve the pastoral relationship.
 - ii. In the case of a Temporary Pastor, Covenant Pastor or Commissioned Ruling Elder, this policy shall be communicated to the congregation when the congregation is notified of the Session's decision not to renew the Covenant or Commission.

Note: After the call of a new Pastor or commissioning of a Ruling Elder, the session, the COM liaison, or other representative of the COM will review this policy with the former pastor.

- c. *Providing Support and Assistance to New Pastors.* Presbytery in general and the COM specifically will provide support to a new pastor in making decisions about a former pastor's relationship with the congregation and, if necessary, act as an intermediary among the new pastor, the former pastor, and the congregation.
- d. *Compliance Issues.* Non-compliance with this policy is a chargeable offense under the Rules of Discipline. Upon the invitation of the new pastor, the clerk of session, a serving elder, the church's liaison, or upon its own initiative, the COM will refer all non-compliance issues that could disrupt the peace and unity of the church to the Stated Clerk.

COVENANT OF CLOSURE

_____ (name of pastor) and _____ (name)
Presbyterian Church, and the Commission on Ministry of the Presbytery of the James, having
discussed the intent and requirements of the Presbytery’s policy regarding former pastors enter
into the following covenant, effective _____ (the date of the dissolution of the
pastoral relationship):

- I, _____ agree;
- a. not to become involved in any leadership or advisory role (public or private) in the _____ Presbyterian Church congregation; and
 - b. not to intervene, support, or give advice to anyone involved in a congregational disagreement or dispute;
 - c. not to officiate in any special events in the lives of former members or of the congregation, including weddings, funerals, baptisms, worship leadership, church anniversary activities, etc. unless expressly invited by the moderator of the session.
 - d. to refuse requests for pastoral services made by members of the congregation;
 - e. to consult with the moderator of session prior to visiting members of the congregation, attending worship, or attending a special event..
 - f. to refrain from giving opinions or directions regarding church business;
 - g. to explain and affirm the above principles to the congregation in writing (by letter or newsletter) and/or the pulpit before departing.
 - h. It is understood that this policy does not affect or require termination of friendships with individuals in the _____ Presbyterian Church congregation.

2. The Session of the _____ Presbyterian Church
agrees:

- a. to respect the terms of the Covenant agreed upon by Rev. _____ outlined above; and
- b. to interpret the terms of the Covenant to the congregation and incorporate this agreement in the minutes of the congregational meeting or Session meeting when the pastoral relationship is dissolved; and
- c. to incorporate this agreement in the session minutes.

By signing the document, I agree to comply with all the above guidelines.

Pastor/Associate/Covenant/CRE

Date

Clerk of Session

Date

COM Representative

Date

Ethical Guidelines

The COM offers the following ethical guidelines to assist pastors in complying with this policy and leaving a congregation in a healthy, constructive manner:

- a. *Congregational Education.* The COM, most often through the liaison, will assist the pastor in educating the congregation both before and after the pastor's departure. Prior to departure, the pastor should clearly and consistently state that she or he cannot exercise any pastoral roles at the pastorate's conclusion. This helps church members understand that it is not a personal matter when the former pastor declines to participate in a baptism, wedding, or funeral, or to make a pastoral call.
- b. *Pastoral Care to Church Members.* If contacted, the former pastor should encourage church members to depend on the new pastor for pastoral care. **Immediately following the contact, the former pastor should notify the current pastor of the contact and the need for pastoral care.** The former pastor should not make hospital or home visits except to personal friends under the conditions outlined in the policy..
- c. *Friendships with Church Members.* All pastors should endeavor to develop primary friendships beyond the members of the congregation. However, over the years personal friendships may develop between a pastor and some church members. The pastor must ensure that such friendships respect appropriate professional boundaries. While such friendships need not end with dissolution of the pastoral relationship, they must change in order to remain healthy.
 - i. It is important for the former pastor to refrain from performing baptisms, funerals, weddings, and other services for friends. Presiding at services for friends, but not other congregation members, creates the unhealthy impression of favoritism. It may be a better practice to decline participation in all such services.
 - ii. Pastors must be clear in establishing boundaries that preclude all pastoral roles. It is important for former pastors to discuss these boundaries with their friends.
 - iii. It is appropriate for former pastors to listen and provide empathic support to friends who are members of their former church. However, the former pastor shall not provide pastoral care and should notify the current pastor of the need for pastoral care as soon as possible upon conclusion of the conversation.
 - iv. The former pastor may make hospital visits to church members who are personal friends. In that case, however, the former pastor should take particular care to maintain the role of a friend and shall inform the current pastor of the visit.
- d. *Church Governance.*
 - i. A pastor shall not influence, directly or indirectly, the selection of her or his successor, nor shall the pastor serve as a reference on the church's Ministry Discernment Profile. (See Covenant of Closure)
 - ii. A former pastor should never communicate with church members about issues

affecting the governance of the church or the selection or performance of any subsequent pastor. The situation becomes especially difficult when members of the former pastor's family serve on Session or other Commissions and boards of the congregation. **As a result, the COM strongly recommends that the spouse/partner of the former pastor also not be involved in the life and work of the pastor's former church during the transition period.** This recommendation is not applicable in clergy couple situations when both were employed by the same congregation. (See Section VI in Policy).

e. *Invitations to Participate in the Church's Services.*

- i. Former pastors may officiate at services for members of her or his former church or at other services within its properties **only upon the invitation of the moderator of session.** The former pastor should carefully consider the wisdom of accepting any such invitations, accepting one invitation makes it difficult to refuse others. Moreover, accepting an invitation may not be in the best interest of the congregation.
- ii. If the former pastor decides to accept an invitation from the moderator of the session to participate in a service, **the former pastor shall assist with the service under the direction of the current pastor.**

f. *Property Issues.*

- i. The departing pastor shall turn over all property that belongs to the church (keys, credit cards, computers, furniture, etc.) prior to the pastor's departure. The COM strongly recommends that as far in advance of the pastor's departure as practical, the departing pastor and the Property Commission of the session (or trustees) agree upon a list of property that may be taken and the property to be returned to the church.
- ii. Ordinarily, the departing pastor shall vacate both the manse and church office no later than the effective date of the dissolution of the pastoral relationship.

g. *Continued Compliance with Presbytery Policies.* Former pastors continue to be subject to Presbytery's policies (including, but not limited to, Presbytery's Sexual Misconduct Policy/Boundary Training) until they transfer to another presbytery.

h. *Social Media.* In these days of increased usage of social media, former pastors may have more connections with past church members than ever before. Followers on these outlets may not necessarily see a distinction between a pastor's personal use of social media and their role in the church. **If the pastor is contacted about church matters or pastoral care via any kind of social media methods, the pastor should diligently apply the same guidelines from Sections b, c, and d, above.**

Frequently Asked Questions

For the departing pastor: (within the first year of the arrival of the new minister)

1. **If someone in the congregation reaches out to me for pastoral care/pastoral visit, how should I respond?**
 - a. Please ask them to reach out to the new pastor to let them know of the pastoral need.
 - b. Also follow up with the new pastor to let them know that you have been contacted and that you referred them to contact the church.
 - c. If you would like to offer pastoral care to the person who reached out, you **must** have approval from the new pastor.
2. **What should I do if my personal friend has asked me to visit?**
 - a. It is appropriate to visit a personal friend within the congregation. It is very important to keep appropriate boundaries by refraining from talking about church business or offering your personal opinion on the life and future of the church.
 - b. During your visit, please be reminded and remind your friends that you are offering support as a friend.
 - c. If you are going to visit a friend in a hospital or care facility, it would be best to inform the new pastor of your visit. This helps to clear up any confusion around the former pastor's role in providing pastoral care in the church.
 - d. Please use discernment to be sure that your visits with the church member/friend do not prohibit that member/friend from developing a healthy relationship with the new pastor.
3. **How should I respond to requests from the family to preside over baptisms, weddings or funerals not on church property?**
 - a. The restrictions of G-2.0905 on providing pastoral services to members of former congregations apply whether or not services are held on church property. If a former pastor receives a request to provide pastoral services to a member of a former congregation, they should refer the request to the current pastor or moderator of session.
4. **After the one-year anniversary of the new pastor's arrival, how should I respond to requests for pastoral care and pastoral visits? What level of participation is acceptable?**
 - a. While some of the requirements of this policy come to an end after the one-year anniversary of a new pastor's arrival, the restrictions of G-2.0905 on providing pastoral services to members of former congregations do not expire. The appropriate response for all requests for pastoral services is to refer the person to the current pastor or moderator of the session.
 - b. Attendance in worship after the one-year anniversary is acceptable. It is also extremely helpful to have a conversation with the new pastor to talk about expectations moving forward as it relates to healthy participation as the former pastor of the congregation.

For the interim/newly installed pastor:

- 1. During the first 12 months of my ministry, how do I handle immediate requests from members to involve the former pastor in the life of the church (weddings, funerals, pastoral care, etc.)?**
 - a. **Interim:** Remind the member/family that this goes against the policy and that the interim is available to support the family in their time of need.
 - b. **Newly Installed:** In keeping with the primary goal of this policy – to provide the incoming pastor and the congregation the appropriate opportunity to establish healthy new pastoral relationships – if the new pastor discerns the new pastoral relationship to be well-established, the pastor as moderator of session can consider offering an invitation to the former pastor. If the new pastor thinks their new pastoral relationship has not yet been sufficiently established, it would be beneficial to say no to the former pastor and to have a conversation about boundaries.
- 2. At what point should I involve the Liaison of the congregation if I have concerns about this policy?**
 - a. You may reach out at any time. However, conversations with the congregation’s liaison will not replace the direct conversations that may need to take place between the former pastor and the newly installed pastor.
- 3. How early is too early to invite the former pastor to participate in the life of the church?**
 - a. You may find that it is helpful and healthy to invite the former pastor to participate in significant moments in the life of the church within your first year as a new pastor.

For the Session

- 1. How can the Session help to uphold the spirit of this policy?**
 - a. Study the policy and together discern the spirit of the policy.
 - b. Support the new pastor by being sensitive to the need for the new pastor and the congregation to develop a pastoral relationship.
 - c. Teach the sub-committees/church groups that requests for the involvement of the former pastor in the life of the church must come to the Moderator of the Session for approval by the session.
 - d. The session should share the spirit of the policy with the congregation at the departure of the former pastor and again at the arrival of the new pastor.