Exit Checklist for Lay Leaders

A good beginning depends on a good ending. Your congregation's ability to call a successor depends on how well the ending of the previous relationship is handled and the ability of both the congregation and the departing clergy person to let go.

The following are not commandments, rubrics, or rules (for the most part). They are the collected wisdom and good practices about an important moment in the life of a congregation – a moment of celebration, ending, beginning, death and resurrection.

Leave-taking Essentials

- When informed by the clergy person that he/she is resigning, retiring, or has accepted a call to another congregation, the Senior Warden must inform the Bishop in writing (by letter or e-mail) that the congregation is without a rector and request the Bishop's assistance (Title III, Canon 9, Sec. 3(a)(1)).
- Upon receipt of the clergy person's letter of resignation, the vestry must formally accept the resignation (Title III, Canon 15, Sec.1).
- 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 departing clergy person, clarify the terms of unused leave or vacation time, plans for continuing contributions into the Church Pension Fund, and arrangements for insurance coverage.
- 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. Help make arrangements for the clergy person to say "good-bye" to congregational organizations and staff.

Communicating the Decision

- Assist the clergy person with writing a letter to the congregation that outlines his/her plan for leaving, expresses gratitude for your mutual ministry and assures them that diocesan staff will support and guide the congregation through the transition.

- Develop an agreement with the clergy person and let the congregation know, in writing, that when the clergy person leaves he/she will:
    - No longer be able to function as their pastor or priest;
    - Will not officiate at their baptisms, weddings, or funerals;
    - Will return only at the invitation of his/her successor, and then only as their former pastor.

- If the clergy person has been part of a community, ecumenical or interfaith group be sure they are aware of his/her departure and if someone else from the congregation can serve in his/her stead, make sure that someone can take on the responsibility.

Preparing for the Departure

- Schedule an exit interview for the wardens (and other lay leaders, if appropriate) and the departing clergy with a facilitator.

- Get a list of the clergy person's current responsibilities, a date by when they will be handed off, and designate a specific person to take up that task.

- With the clergy person, review all leadership positions, clarifying roles and responsibilities as needed.

- Make sure wardens/vestry and clergy person are clear about all financial commitments to each other and how to handle whatever vacation time remains.

- Get up-dated job descriptions for paid staff.

- Find out about any up-coming commitments such as previously planned baptisms, weddings, memorial services that will occur after the departure date for which alternate arrangements must be made.

Organizing for a Transition of Responsibility

- Review with the clergy person the leadership responsibilities of wardens and vestry for property, finance and administration during the transition.

- Get a list of those in hospitals, nursing homes, assisted living facilities, and home bound, with expectations for visits and how frequently. Be sure there is a list of names, addresses and contact information for all of them.

- Ask the clergy person to share significant pastoral concerns such as premarital counseling, pregnancies, divorces in progress, terminal illnesses, and bereavement, remembering to maintain appropriate confidentiality. This information should be left in writing for the interim priest and may be entrusted to either the Senior Warden or appropriate Canon on the diocesan staff for delivery.

- Find out if there are any preplanned funeral arrangements and where the information is filed.

- With the assistance of the clergy person develop a calendar for the upcoming year, including visits by the bishop, homecoming, patronal feast days, sunrise services, graduations, every member canvas, annual meeting date.

- Find out if there are commitments for your congregation's participation in community or ecumenical services, as well as expectations for preaching at or hosting such events.

- Ask the clergy person to balance his/her discretionary account and turn it over to the wardens.

- Get a list of any special funds, their purpose, use and signatories, including scholarships and other financial commitments.

- Know where the most recent audits, parochial reports, budgets for the past three years, and congregational by-laws are kept.

- Know the location of the safe and find out who has the combination.

- Know where the bank deposit box is located and who has the key.

- Assure that the parish lists and service registers are up to date.

- Know the location of any historical documents and/or archives.

- Make sure that the clergy person's office is cleaned of all personal affects and files and is cleaned, repainted (if necessary) and otherwise prepared for his/her successor.

- If the congregation provides housing, establish a date certain for it to be vacated and prepare it for the successor.

- Ask the clergyperson to prepare a file of orders of service for the past three years and document any special customs for the conduct of worship, especially weddings and funerals.

- Make sure that there are certificates for all current Eucharistic Ministers and Visitors, and lists of current altar guild members, ushers, acolytes, and servers with contact information (phone numbers and e-mail addresses).

- Know where to find the home communion set, chrism, last year's palms, the nativity set, etc.

- Have a list of all groups that use the buildings, along with contact information and copies of all current agreements.

- Make sure there is temporary coverage for pastoral emergencies and sacraments until the interim arrives.

Starting the Process

- Schedule a meeting between the vestry and the bishop soon after the retirement/resignation is announced to discuss the diocesan process for calling a new rector.

- Arrange for the Diocesan Transition Minister (DTM) to meet with the whole congregation or come on a Sunday to preach and celebrate in order to give everyone an understanding of the transition process.

- Engage an interim pastor, as appropriate (full- or part-time).

    - Determine mutual expectations for the interim time and relationships between interim and vestry and interim and congregation.
    - Draft a clear Letter of Agreement.
    - Decide who will chair the vestry.
    - Bring interim up-to-speed on congregational styles of worship, administration, structure, policies regarding building use and equipment, upcoming major events.

    - Review congregational records with interim, including financial reports, budgets, congregational register and service book, organizational chart, personnel policies, church calendar, and previous mission studies or development plans.
    - Establish system for informing interim of pastoral care needs in the congregation and tell him/her of any immediate pastoral concerns.
    - Introduce interim to relevant community, clergy, and diocesan organizations.
    - Work with interim to initiate needed changes.

- Repeat cycle when interim departs, updating records and data.

- Conduct a mutual review of ministry covering the interim period.

Adapted from the Exit Checklist for Clergy based upon the work of numerous Diocesan Transition Ministers, especially the Rev Thad Bennett of Vermont and the Rev. Canon Tom Orso of New York.