

# Rectors in the Transition-Out Process

The rector is the primary pastor of a congregation and therefore the process of “transitioning-out” of the rector’s office is critical to the life of the parish at that time and into the future. Care must be taken to make this transition as grace-filled and effective as possible. The legacy of a rector is largely influenced by that rector’s actions and words during this time of change.

Transitioning-out is different for each priest and for each congregation. The process must pay particular attention to the unique culture, history and current conditions in the parish. Personal needs, organizational needs, and personalities – all - must be addressed. Consideration of the ebb and flow of congregational life is extremely important in making a successful transition.

Ministry is more about relationships than about hierarchy. Ordained ministry at all levels is about relationships. Relationship building was critical at the beginning of the rectorate and it is critical at the end of that tenure to deal with those relationships as they now change.

## **Critical Resources:**

- Convene a very small group of trusted, thoughtful advisors (2 or 3) to discuss and advise the timing of the departure. Absent critical health issues, discuss the timing of your departure. Consult the Office of Transitions Consultant and the Bishop of Western Louisiana for support and resources.
- Transparency is important: be clear up front about your intentions, the process and your expectations. You are the resource to make this happen.

The following are recommended best practices:

## **Rectors in Transition**

There are specific, chronological steps to be taken when a Rector exits the organization. These are listed in general chronological order.

### Before the decision is public:

1. Consult your spiritual director.

2. Contact the Bishop regarding resignation and then the Transitions Consultant. Discuss the situation with senior staff members and key lay individuals.
3. Determine a departure date with timing sufficient to take necessary and appropriate action at any upcoming Vestry meetings.
4. Determine the timing and character of the public announcement; work with diocesan leadership to plan the specifics.
5. Announce your general intention to the Vestry and then any other requesting that the members treat the information confidentially until the public announcement is made. Do not take confidentiality for granted. We can expect it, but we know that some cannot keep this confidential appropriately.
6. If retiring, consult with the Church Pension Fund. Send the appropriate forms to the bishop's offices.
7. Develop a communications plan – general information regarding the resigning Rector and family should be shared clearly with all the people of the parish; everyone needs to know what to expect during the time of transition.
8. Begin to identify your (and your family's) hopes, needs, and anxieties related to your leaving office.
9. Determine any personal needs for reconciliation and begin the process.
10. Determine what your central message is as you are exiting the office; rehearse the message; solicit feedback before "going public." Stick to the message
11. Discuss your general intention with the entire staff, requesting that the members treat the information confidentially until the public announcement. Do not take confidentiality for granted – be clear in your expectations.

#### Once the public announcement is made

12. Conduct meetings with key individuals and groups – Staff should meet regarding this at an earlier stage.
13. Utilizing both the Bishop and Transitions Consultant, as they will specifically train the Vestry for assumption of authority should it be necessary – this ought to be an ongoing process; address Canons, policy, practice, and procedure.
14. If applicable, create a plan for orienting and transferring jurisdiction to an Interim Rector.
15. Develop and communicate a clearly defined timeline of specific steps for exiting the congregation, with goals, dates, and accountability; consider specific projects or programs that need to be brought to a conclusion or hiatus.
16. Request a consultant/coach facilitated exit interview with the Vestry. This allows the Rector to reflect on the tenure and to allow others to ask specific questions regarding programs, actions, and situations that have occurred in the parish.
17. Reconcile outstanding issues; prepare a report on those which cannot be resolved prior to retirement.

18. Take thoughtful action to resolve any difficult issues that might risk a positive launch of the new Rector's tenure.
19. Do NOT deplete the discretionary fund. Have the fund audited and the report given to the Vestry.
20. Be clear that you will not participate in the calling of an interim rector nor of the rector who is to follow you.
21. Be clear that pastoral relationships end at that time of your resignation/retirement. You will not do weddings, funerals or other pastoral liturgies nor will you make pastoral or hospital visits. Your tenure comes to a close on a date specific and it is important for the health of the congregation that you move on as do they.

### **Some Cautionary Notes:**

Do make yourself available to the Interim Rector or New Rector, if requested to do so.

Do not take it personally if the Interim or New Rector does not seek your counsel.

Do focus on your transition-out and not on the transition-in of the new Rector.

Do consider your legacy in your actions and words.

### **RECTOR'S STAFF**

The Rector's Staff serves at the pleasure of the Rector and care should be taken in making a transition with and among this group of people. Senior level staff members (other clergy) *may be expected* to move on while support staff members, (Receptionists, Secretaries, Accountants) may not. Ideally, staff will remain in place for time during the new rectorate, with the expectation that the new Rector will assess organizational needs and individual performance to make a collaborative decision with each incumbent. This allows for an orderly transition. Should it be the personal intention of any individual staff member to resign or retire concurrent with the Rector, the decision to do so should be made in consultation with the Rector in consideration of the personal needs of the individual and the needs of the diocesan organization. Therefore, with great pastoral care, a survey of the staff should be conducted as part of the transition process – to allay any individual concerns about job security, and to determine who also is considering leaving the organization. Senior staff leaving at the same time as the Rector may not be desirable. The survey should be conducted by a single individual whose pastoral skills and confidentiality will be trusted by the employees. Please discuss this with the Transitions Consultant

Typically, the simultaneous exit of two or more senior level positions is not in the best interest of the organization. If such a situation must be accommodated, consider staggering the exit dates to allow distinct transitions for each position. To help matters, individualized arrangements for temporary or permanent appointments to fill the positions should be considered.

### Staff Transitions:

1. How will transitions out of the staff be handled? Who is in charge of that?
2. Determine how the staff member's institutional memory will be gathered and recorded.
3. Determine the individual's specific availability should their assistance be required after their departure date. Obtain contact information.
4. Determine which files are to be reviewed, by whom, and which records need to be retained or disposed.
5. Determine who secures and who has access to confidential files and information. Determine how that information and those responsibilities will be transitioned.
6. What personal relationships have evolved? Is there a need to manage those through the transition?  
Who will do this?
7. Determine if, how and when the vacant position will be filled. Determine who will make those arrangements and their authority to make final decisions.
8. Determine the timing and character of the public announcement; develop a communication plan regarding the resignation/retirement and the position itself. Information regarding the staff should be shared with the parish. Congregations, clergy and parishioners need to know what to expect during this time of transition.
9. Develop and communicate a clearly defined timeline of specific steps for exiting the organization, with goals, dates and accountability; consider specific projects or programs that need to be brought to a conclusion or hiatus.
10. In consultation with the Vestry, determine the fiscal impact of the resignation/retirement, the cost of temporary appointments, and the cost of recruitment and selection.
11. As appropriate, conduct a consultant/coach facilitated exit interview for the staff member with the Standing Committee and/or Diocesan Council.

### **A SPECIAL NOTE ABOUT FAMILIES**

The Rector's family is important to the ministry and life of the Rector. The Vestry, and key individuals in the parish, need to pay special attention to this family; allowing for an appropriate transition and support of the spouse and children of the Rector. Inattention to the needs and concerns of the family will leave a lasting impression on the family members and will impact the transition in of the new Rector. Families often feel the joys and sorrows of the Rector more intensely than others. Because of their supportive ministry of the Rector, consideration and support of their transition out is extremely important. Being gracious and honoring this ministry is important.