



**Southeastern Iowa Synod**

**Evangelical Lutheran Church in America**

God's work. Our hands.

# The Call Process

## **The Pastor's Transition Packet**

**Southeastern Iowa Synod Center for Ministry**

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In the ELCA, rostered minister status is granted to Ministers of Word and Sacrament (Pastors) and Ministers of Word and Service (Deacons). The majority of congregations are served by pastors, so this manual will often use the term “pastor” rather than “rostered minister.”



# **Contact the Office of the Bishop**

The Office of the Bishop, enlisting the resources of the synod, is committed to being as helpful as possible to you. Congregational leaders are encouraged to contact the Office of the Bishop upon the resignation of the current pastor. The bishop will assign one of the assistants to the bishop as the bishop's representative throughout the call process.

## **The Role of the Bishop's Representative**

The assistant to the bishop who serves as the bishop's representative for the call process is your primary contact for any issues that arise for which you need assistance from the synod. There will be a great deal of telephone and/or e-mail contact between the bishop's representative and the council and call committee chairpersons.

In addition, this person will generally visit the congregation three or four times during the course of a call process:

1. To conduct an exit interview with the pastor and the council shortly after the pastor's resignation is announced. Sometimes the resigning pastor will then be excused and the meeting will continue with an overview of the entire call process, focusing particularly on the Council's responsibilities.
2. To provide the Council with an overview of the entire call process, focusing particularly on the Council's responsibilities – if this did not occur as part of the exit interview meeting.
3. To provide the Call Committee a thorough overview of the process, focusing particularly on the Call Committee's responsibilities.
4. To preach at least once and visit the congregation at other times deemed appropriate.

This bishop's representative will most likely be present in worship leadership for the installation of the person called by the congregation.



# The Current Pastor Resigns

When the pastor resigns or retires, the primary concern for many congregations is to find a new leader quickly. No one can guarantee how long the call process will take. Most congregations underestimate the time needed for completion of the call process. Congregations are encouraged not to hurry the process of calling a new pastor. There is work to be done to lay a sound foundation for the next chapter in the congregation's life.

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## The Termination Date

When a pastor accepts a new call, the pastor will normally notify the Office of the Bishop first, then the congregational leadership, then the congregation through a letter to all members. Normally the termination date is approximately 30 days from the time of announcement, and any accrued vacation is taken at the end of the tenure. (For instance, if a pastor announces her leaving in early September and has two weeks vacation accrued, the pastor may announce, *"My resignation will be effective October 30, with the last two weeks of October taken as vacation. My last Sunday will be October 16."* The congregation pays all salary and benefits through October 30, though all expenses (car allowance, etc.) would end as of October 16.

## The Farewell Celebration

A congregation will want to arrange with the pastor a time to celebrate and give thanks for the years of ministry together. Often this takes place on the final Sunday. It is often appreciated that others of the pastor's extended family and ministry colleagues also be invited. This may include use of "Thanksgiving at the Conclusion of a Call" during worship; that resource is included as an appendix to this document.

## Healthy Closure

The resignation of a pastor from his or her congregation is a difficult transition. It is challenging for both the pastor and the parishioners as the pastoral relationship ends and new relationship boundaries are

established. For congregations, it can be a time of grief, anxiety and confusion. Saying goodbye is never easy.

A good pastoral relationship is a blessing. Congregations who have been served competently and compassionately by a pastor often want the continued pastoral leadership and presence of the former pastor at their family's wedding, funeral, or baptism. When a pastor resigns, he or she may be asked to return for numerous "special occasions." This is a delicate area and painful for lay people and pastors alike.

While this desire to continue a good pastoral relationship is understandable, it is inappropriate and a matter of professional ethics for pastors. What is at stake is the integrity of the pastoral office. When a pastor leaves a parish, he or she is no longer the pastor of those parishioners. Some friendships may continue. This is tricky, but the pastoral relationship is over.

Upon leaving a congregation, it is not appropriate for the former pastor to continue to function in that role by performing pastoral acts for former parishioners. This is most difficult for people to comprehend. The pastoral act of presiding at those services, however, belongs to the interim or newly called pastor.



# ***ELCA Policy on Former Pastors***

Synod Constitutions define the relationship between the departing pastor and the congregation in *Constitution for Synods of the Evangelical Lutheran Church in America*, S14.19:

+S14.19. Ministers of Word and Sacrament shall respect the integrity of the ministry of congregations which they do not serve and shall not exercise ministerial functions therein unless invited to do so by the pastor, or if there is no duly called pastor, then by the interim pastor in consultation with the Congregation Council.

For retiring pastors, ELCA policy further states:

## II. Congregational Membership

A retired pastor should not remain a member of the congregation served at the time of retirement. Transferring one's membership to another congregation allows the successor pastor to assume pastoral leadership more readily. It also provides an opportunity for the retired pastor to enter fully into the life of a different congregation with clarity about the pastor's retired role.

## III. Pastoral Service

At the time of retirement a pastor is no longer pastor of a congregation and therefore must discontinue the functions of the pastoral office in the congregation unless specifically authorized to do so. The service of retired pastors is governed by the *Constitution for Synods* [S14.19], which describes the role of ordained ministers in congregations in which they do not serve.

*From "Retired Pastors in the Evangelical Lutheran Church in America,"  
Manual of Policies and Procedures for Management of the Rosters.*

## **Sample Announcements for Newsletters and Bulletins**

### ***A sample announcement for a Pastor who is leaving:***

After Pastor \_\_\_ leaves our congregation, he/she will not be available to conduct or even participate in such events as funerals, weddings, hospital calls, emergency calls, or any other functions normally carried out by a pastor in a congregation.

### ***A sample announcement for a Pastor who is retiring and remaining in the same community:***

Pastor \_\_\_ will be transferring his/her membership to \_\_\_\_\_ Lutheran Church. He/She will not be available to take on any kind of leadership role within our congregation, nor will he/she be available to conduct or even participate in such events as funerals, weddings, hospital calls, emergency calls, or any other functions normally carried out by a pastor in a congregation.



**Advice for Former Pastors:** The responsibility of establishing new relationship boundaries is yours. When asked by former parishioners, respond immediately, “It is simply not proper for me to do that. I am not your pastor anymore, but thanks for considering me.”

**Advice for Parishioners:** Don’t ask. It is awkward for both the new and the former pastor. Honor your former pastor by inviting him or her to come as a guest. Show respect and regard to the new pastor by allowing him or her to perform his or her pastoral duties.



# **Questions for Exit Interview**

For use by the bishop's representative and council in interviewing the pastor who is leaving. This can be given to the pastor to think about ahead of time, before the actual interview.

1. Pastor, you have served this congregation for \_\_\_ years. What were your reasons for coming here? Did you find what you expected?
2. Where have you found your greatest fulfillment in your ministry and where have you felt affirmed? What has frustrated you the most and where have you met resistance?
3. What are our congregation's greatest strengths? In what ways do we need to change and grow?
4. What vision/initiatives/efforts in which you are involved right now do you hope will be carried on into the future? What will it take for that to happen?
5. What are some things you may have hoped to accomplish but remain unrealized? Where is the "untapped potential" in this congregation?



# Certification of End of Call

In order for the Office of the Bishop to appropriately communicate necessary information, the pastor who is resigning or retiring from call to this congregation is asked to fill out the information below and return to the following address NO LATER than the last day in the office.

Kathy Smith  
Southeastern Iowa Synod  
2635 Northgate Drive  
Iowa City, IA 52245

Name of Pastor \_\_\_\_\_

Congregation \_\_\_\_\_ City \_\_\_\_\_

Last Day in the Office \_\_\_\_\_

Last Day on the Pay Roll \_\_\_\_\_

Please check one of the following:

\_\_\_\_ I intend to begin a new call on \_\_\_\_\_  
(date)

\_\_\_\_ I intend to retire effective \_\_\_\_\_  
(date)

\_\_\_\_ I intend to apply for On Leave From Call Status  
(Contact the Office of the Bishop for more information)

\_\_\_\_ Other (please explain) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Contact information during transition, retirement, or On Leave From Call

Mailing address: \_\_\_\_\_  
\_\_\_\_\_

Email: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

There are "End of Call" forms to be completed by both the congregation and the pastor available on the Portico Benefit Services website under Benefit Administration.



# ***Certification of Church Records***

Upon the resignation of a pastor, the following policy of the Evangelical Lutheran Church in America applies:

“The parochial records of each congregation shall be kept in a separate book which shall remain its property. The secretary of the congregation shall attest to the Bishop of this Synod that such records have been placed in his/her hands in good order by a departing pastor before:

- (a) installation in another field of labor, OR
- (b) the issuance of a Certificate of Dismissal or Transfer.”

Before the pastor leaves the present field of service, he/she must bring the record books to the secretary of the congregation for review.

This is to certify that I have examined the parochial record of

\_\_\_\_\_ Lutheran Church

\_\_\_\_\_, Iowa and find them in good order.  
(Town)

\_\_\_\_\_  
Secretary of the Congregation Council

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
Town, State

\_\_\_\_\_  
Date

Upon completion, mail to Synod Bishop:

Southeastern Iowa Synod – ELCA  
2635 Northgate Drive  
Iowa City, IA 52245



# ***Certification of Completion of All Financial Obligations***

All financial obligations, salary, pension, health benefits, death benefits and allowances, together with continuing education funds, have been met and paid to The Reverend \_\_\_\_\_ up to the effective date of termination of services. Also, satisfactory settlement of all financial obligations has been made by The Reverend \_\_\_\_\_ to \_\_\_\_\_ Lutheran Church, \_\_\_\_\_, Iowa.  
(Town)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Pastor

\_\_\_\_\_  
Treasurer

Upon completion, mail to Synod Bishop:

Southeastern Iowa Synod – ELCA  
2635 Northgate Drive  
Iowa City, IA 52245



# ***Exit Check-List for Pastor***

Pastor \_\_\_\_\_ Congregation \_\_\_\_\_

*Give copies to Congregational Chairperson and interim or incoming pastor.*

1. Permanent Parish Record book:
  - Are records up to date?
  - Where is it kept?
  
2. Potential Voting Members:
  - Is there a prospect list?
    - Where?
    - Status?
  - Any adult baptism potentials?
  - Any adult instruction class potentials?
  - Status of confirmation class
    - What is the next step?
  
3. Congregational Report:
  - Where is the copy of the latest Congregational Report?
  
4. Church Council Records:
  - Current year's minutes – where?
  - Previous years' minutes – where?
  - Committee reports – where?
  - Parish plans, unfinished council matters – where?
  
5. Other Congregational Records:
  - Minutes of congregational meetings – where?
  - Church archives – where?
    - What is in the archives?
  
6. Parish Correspondence:
  - Where?
  - Any pending matters?





# ***Pastor's Input on the Congregation***

*Please limit response to this one page. Send the completed form to:*

*The Southeastern Iowa Synod  
2635 Northgate Drive  
Iowa City, IA 52245*

Pastor \_\_\_\_\_

Congregation \_\_\_\_\_ City \_\_\_\_\_

1. What are the strengths of this congregation as you experienced them?
2. What are the weaknesses of this congregation as you experienced them?
3. In what ways has this congregation grown during your ministry?
4. What opportunities for ministry does this congregation have for the future?
5. What community changes will affect the future of this congregation?
6. List the attributes and skills of a pastor that would best serve this congregation during the next several years.
7. Give your evaluation of the community in general and of the school system.



# Maintaining ELCA Benefit Coverage In Times of Transition

When a call ends or starts, there are plenty of details and emotions to sort through. Let Portico help ensure that benefits don't add to the complexity. In times of transition, it's important for each party involved — rostered minister, current congregation, and new congregation — to contact Portico right away.

## When a Call or Assignment Ends

<p><b>Rostered Minister</b></p>	<p><b>As soon as a change is anticipated, call Portico at 800.352.2876.</b></p> <ul style="list-style-type: none"> <li>• Don't wait until dates and details are pinned down. The sooner Portico is notified, the more options there may be to keep ELCA benefits active.</li> <li>• Next call or assignment unknown? Portico will explain next steps, which may include reviewing monthly costs to continue health coverage, or contacting Securian Life to continue supplemental life insurance.</li> </ul>
<p><b>Current Congregation</b></p>	<p><b>As soon as the rostered minister's end date is known, report it on EmployerLink.</b></p> <ul style="list-style-type: none"> <li>• Sign in to <i>EmployerLink.PorticoBenefits.org</i> and go to <i>Resources &gt; End of Call or Employment</i>.</li> <li>• The end date is the rostered minister's last working day plus accrued vacation.</li> <li>• Portico will email the rostered minister with next steps after the end date is reported.</li> <li>• If Portico receives a start date from a new congregation and hasn't received an end date from the current congregation, Portico will contact the current congregation to confirm the call is ending.</li> <li>• Portico cannot administer severance packages.</li> </ul>

## Before a New Call or Assignment Begins

<p><b>New Congregation</b></p>	<p><b>Before the new rostered minister's start date, report it on EmployerLink.</b></p> <ul style="list-style-type: none"> <li>• Sign in to <i>EmployerLink.PorticoBenefits.org</i> then go to <i>Resources &gt; Enrollment Center</i>.</li> <li>• If the start date has not been reported, ELCA health benefits will end on the rostered minister's end date at his or her former congregation. The rostered minister and eligible family members won't have active coverage until the start date is reported.</li> <li>• If there are fewer than 31 days between the end and start dates, Portico will waive the cost of health coverage during this time. However, this is only possible once the new congregation reports the start date.</li> <li>• If Portico is notified after the start date, benefits will be reinstated retroactively.</li> </ul>
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**Don't wait for your new pastor or deacon's first day! Contact Portico up to 60 days in advance.**  
You have an impact on your new rostered minister's benefits before he or she even starts. Early reporting is critical to avoid a gap in health coverage and a potential situation where a claim is denied.



<b>Special Circumstances</b>	
<b>Sponsored Couples</b>	<p>Nearly 1 in 10 sponsored plan members is part of a sponsored couple — that is, when both spouses are rostered ministers or other church employees sponsored in the ELCA benefit program. Contact Portico to discuss specifics about how a change in call or assignment works for a sponsored couple.</p> <p><b>Portico Customer Care Center</b>  800.352.2876  <i>mail@PorticoBenefits.org</i></p>
<b>Interim Ministry</b>	<p>Interim ministers often experience more frequent transitions between calls or assignments. Portico has a dedicated point person for interim ministers and their congregations.</p> <p><b>Andrew Feller</b>  Portico Customer Care Service Recovery and Innovation  800.352.2876 ext. 4060  <i>afeller@PorticoBenefits.org</i></p> <p>Tip for interim ministers: As you near the end of your assignment, please share this document with the incoming pastor to help ensure a smooth transition into his or her new position.</p>

