



# LEAVING WELL FROM AN APPOINTMENT IN THE DIOCESE OF NIAGARA

Appointments by their very nature are time limited. Clergy are welcomed into a community for months, years, or even decades but laity remain. How clergy leave while maintaining healthy pastoral boundaries, is extremely important for the wellbeing of the parish or mission and the cleric.

Clergy resignations and retirements are often intense periods of time emotionally, spiritually and financially. This document is intended to ease some of the burdens of the process and to help you prepare to leave an appointment in a manner that supports you and the whole Church in the ensuing time of transition and beyond.

As you consider concluding your appointment, the bishop invites you to prayerfully consider and strictly adhere to the various processes outlined in this document. Please speak with your regional archdeacon if you have questions about how best to leave well in your ministry context.

## **COMMUNICATING YOUR INTENTION TO LEAVE YOUR CURRENT APPOINTMENT:**

- Connect with the Bishop, or their designate, to discuss your intention to resign or retire.
  - Plan to discuss your resignation/retirement date, the use of any accrued vacation time, housing arrangements (if applicable) and possible transitional ministry options (Interims, Sunday Supply, Honorary Assistants).
  - Provide a written confirmation of this intention, after your conversation with the Bishop, including your anticipated final date of ministry.
- Once you have received written acceptance of your resignation/retirement from the Bishop, or their designate, you may confidentially notify your wardens, associate priests (if applicable), deacons (if applicable), and honorary assistants (if applicable).
- The bishop's office will provide a formal announcement letter to be read publicly.
- Following the public announcement, notify local ecumenical groups, clergy associations and funeral homes that you are resigning/retiring from positions you hold in community organizations.
- Be open to answer questions from parishioners, especially around the transition and interim periods. Make clear why these times are important for congregational health.
- Make time for people to say goodbye, thank you and give you their blessing. Also, give space and provide tools to healthily grieve this change.

## **PREPARING YOUR TEAM FOR YOUR DEPARTURE:**

- List all of your current responsibilities and projects; designate specific people to take up these responsibilities and tasks, communicate the details and then assign an official hand-off date.
- Meet with the churchwardens to review their leadership position, clarify their roles and responsibilities, especially those related to times of transition.
- Meet with any paid employees who report to you to review their positions and ensure their job descriptions are up to date.
- Ensure current employee vacation and sick day entitlements have been tracked and are clearly documented for your successor. Note any specific situations regarding leaves of absence.
- Arrange for change of address and personal mail forwarding.

## **ORGANIZING FOR YOUR SUCCESSOR:**

- Prepare a current parishioners list with the most recent pictorial directory (if available). Note active and inactive members and any pertinent pastoral information.
- Prepare a list of those who were recently bereaved, baptized, confirmed, or married.
- Prepare a calendar of events for the upcoming year, including a schedule of upcoming liturgies, Episcopal visits, weddings, baptisms, patronal feasts, parish and annual meetings.
- Provide details of any unique customs for the conduct of worship, especially for Sunday worship, weddings and funerals.
- Share a list of leaders and key volunteers; include their positions, outline their responsibilities, and provide contact information.
- Ensure all screening requirements, including but not limited to, Safe Church training and Police Record Checks (PRCs) are up to date and duly recorded.
- Provide a list of those with access to church keys, websites, social media, secure safe and/or safety deposit box(es).
- Make a list of all email addresses and electronic accounts (including website and social media accounts) related to your work in the parish/mission and include the associated passwords.
- Note any pre-planned funeral arrangements and the file where information is located.
- Provide an updated list of those in long-term care homes, retirement homes, assisted living facilities and who are homebound, noting expected and regularity of visits. Ensure all contact information and important details included.
- Note the location of home communion set(s), chrisms, last year's palms, the nativity set, etc.
- Note clear details and instructions about your parish or mission's involvement in community or ecumenical services, including expectations about preaching and hosting future events.
- Prepare a folder of current agreements and contract information for all groups that utilize the property. Ensure all licenses and lease agreements are up to date.
- If serving in a parish context, prepare a folder with the recent meeting minutes from Vestry, Parish Council, Corporation and other committees.
- Reconcile any discretionary funds and ensure any accounts and/or petty cash is returned to the care of the Treasurer.
- Document any historical or ongoing conflicts, concerns, or Safe Church issues the next incumbent should note.
- Ensure all registers, Vestry Books, policies, and procedures are up to date.
- Tie up as many loose ends as possible. If it needs to be done, do it! Ensure the incumbent doesn't arrive to things left undone that you could have completed.
- If residing in a rectory, establish a move out date, assist the regional archdeacon and wardens with the scheduling of a rectory inspection, and agree on conditions of repair and cleanliness.

## **UPON THE CONCLUSION OF YOUR APPOINTMENT:**

- Ensure email and other parish (or mission) account passwords are changed.
- Return your keys and fobs clearly tagged for their access.
- Return any parish property, including but not limited to, technology, files, credit cards.
- Delete any copies of parish lists or other sensitive information on your personal devices.
- Be attentive to your feelings and be intentional about setting aside time to explore what the next chapter of your life and ministry look like.
- Draw on friends, colleagues, counsellors, spiritual directors to support you in this transition.



## HANDLING RELATIONSHIPS AFTER YOU LEAVE:

- Be mindful that you have no official or canonical role in the parish/mission you leave; your pastoral and administrative functions end as of the date of your resignation or retirement.
- Abstain from engaging in the process to search for a successor, including giving names or offering opinions about candidates.
- After your last day, do not return to the office to check for mail, email or phone messages.
- The responsibility belongs to the leaving clergy to make it clear that the pastoral relationship has ended. Hold the boundary and ensure you are clear that it is not appropriate for you to discuss any parish/mission business after your departure. Avoid meddling in matters involving your successor and former parishioners and refer any requests from former parishioners and the wider community for pastoral acts and care to your successor.
- Plan to worship with another church if you are not moving on to a new appointment.
- A parishioner's primary pastor is always their incumbent. It is the leaving cleric's responsibility to be clear with past parishioners about their relationship. Even if you consider past parishioners to be friends, they are no longer parishioners who are under your pastoral care. You are not their pastor nor their personal chaplain in retirement. Always show your loyalty to the current incumbent and refer spiritual and pastoral care requests appropriately.
- Weddings and funerals of former parishioners and community members, even if held outside of your former parish or mission, are only to be performed in exceptional circumstances and then only with the explicit permission of the new incumbent. Please familiarize yourself with the Bishop's Pastoral Direction on Funeral Practices and Liturgy and the Diocese of Niagara Invitation Protocol documents available in the Clergy section of the diocesan website or through the Bishop's Office.

