



Retirement Best Practices for Pastor and Congregation

By David Rich

The retirement of a pastor from his or her ministry is a unique and critical transition involving the pastor, his or her family, the staff, and the congregation. Planning together for this transition offers the pastor and congregational leadership the opportunity to manage the transition. It also serves as the first step toward working together to do their best in ministry in their last months or years together.

Too often the retirement of the pastor is approached with secrecy, a lack of openness, and an attitude of “biding our time.” Parking lot conversations among church leaders become times of gossip and questions: “Has he or she talked with you about retirement? How old is she? How long do you think he will stay?” And the pastor talks about retirement with his/her family, trusted colleagues, and friends, but not with key church leaders for fear of being a lame duck: “Don’t tell anyone that I am thinking about retirement.”

Developing and implementing a transition plan builds a solid foundation for ministry – for the congregation and the retiring pastor. A transition plan allows the pastor and congregational leadership to have control of the transition and avoids the pastor becoming a “lame duck” by providing direction for the remaining months of vital ministry until the retirement date. Without a transition plan, the pastor simply waits to see what happens after the announcement of the retirement date.

What are some best practices a pastor and congregation can use to plan and manage a healthy and meaningful ending so that the pastor and the congregation can finish together with vitality?

Best practices for the pastor for the time prior to announcing the retirement date include:

- **Reflect on your years of ministry.** When were you most energized and when were you most drained. What has been most fulfilling and what has been most challenging? What have you learned over the years?
- **Examine your present situation.** How are you feeling physically, spiritually, and vocationally? Where would you like to focus your energy? What would you like to see happen in the congregation before you leave?
- **Consider when is the right time to retire.** Consider financial needs, personal health and stamina, family needs, personal goals, and what the congregation needs in pastoral leadership.
- **Consult with the appropriate people.** It is important to talk with your family, your primary support group, denominational executives, or trusted leaders in the congregation. Be aware of any deadlines your denomination or pension plan requires you to meet.
- **Identify your retirement date.**

- **Go on a three or four day silent retreat** to prepare for this time of transition.

Best practices for the pastor and congregational leadership for the time from the retirement date announcement to the conclusion of ministry include:

- **Plan a retreat for the leadership of the congregation.** Include church officers and staff using an outside facilitator. Review and reflect on the years of ministry of the retiring pastor. Identify where the pastor should focus energy during the transition. Develop a transition plan of tasks and time lines.
- **Develop a plan for saying goodbye.** Express appreciation for church members; forgive and ask forgiveness; and deal with staff issues before leaving. It is also important for the pastor and the congregation to recognize and experience their own grieving.
- **Help the congregation understand the importance of boundaries.** Avoid creating unhealthy dependencies. Upon retirement, the pastoral relationship has ended. Once you leave, you will no longer be the pastor. You will no longer officiate at their baptisms, weddings, and funerals.
- **Identify important administrative tasks to be accomplished.** Help the congregational leadership get reports and computer files in order, review and update policies and procedures, and identify ongoing facilities issues that need to be addressed.
- **Help the congregation understand the process by which a new pastor will come to the congregation.** Invite denomination officials to meet with the leadership of the congregation to outline the process. Prepare a question and answer sheet for the congregation.

The retirement of a pastor is a unique and critical transition for many people. It requires open and honest communication. Developing a sound transition plan provides an opportunity for the pastor and church leaders to work together in planning and managing a healthy and vital ending of ministry as the pastor moves toward retirement and a solid foundation for the congregation as it moves into the process of welcoming a new pastor.

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