

Healthy Transitions

Resources for Appropriate Endings and Beginnings

Office of the Bishop

of the

New England Synod

in consultation with

Health and Wholeness Team
Conference Deans
Synod Council



New England Synod
Evangelical Lutheran Church in America
God's work. Our hands.

October 2011

Healthy Transitions

Table of Contents

Letter from Bishop Margaret Payne	p. 4
Part I: Resources for Healthy Termination of Call	
Theological Introduction	p. 5
Expectations	p. 6
Checklist for Departing Pastors	p. 7
Checklist for Congregations	p. 8
Covenant for Congregations	p. 9
Covenant for Departing Pastors	p. 10
Covenant for Retiring Pastors	p. 11
Optional Covenant for Departing Families	p. 12
Rite of Farewell and Godspeed for a Pastor	p. 13
Passages: A Bible Study for Congregations in Transition	p. 15
Resources and Acknowledgements	p. 18
Resources for the Transition	
Pastoral Coverage	p. 19
Covenant for Intentional Interim Pastors	p. 21
Rites of Welcome and Farewell for an Interim Pastor	p. 23
Covenant for Transitional Pastors	p. 24
Schedule of Compensation During Transition	p. 25

Part II: Resources for the Call Process

Compiling the Ministry Site Profile	p. 26
Appointing the Call Committee	p. 27
Receiving a Candidate	p. 28
Sharing Information	p. 28
Interviewing the Candidate	p. 29
The Role and Work of the Congregation Council	p. 31
Introducing the Candidate to the Congregation	p. 32
Announcing the Congregational Call Meeting	p. 32
Issuing the Document of Call	p. 33
Special Circumstances	p. 34

Part III: Resources for Healthy Commencement of Call

Welcoming the Pastor	p. 35
Mutual Ministry Committee	p. 35
Service of Installation	p. 35
Visioning	p. 36
Covenant for Arriving Pastors	p. 37
Sabbatical Policy	p. 38

Appendices:

Glossary of Terms	p. 42
Sample Letters / Sample Prayers	p. 43
Compensation Guidelines	p. 45
ELCA Pastoral Compensation Form	p. 56

Dear Partners in Ministry in the New England Synod:

Although the time of uncertainty during the change from one pastoral leader to another might seem frightening, it is a time when God is profoundly present and active in our life together in the church. At this time, we depend on one another more than ever in our partnership in the Gospel. We meet, pray, and work together in a process that will result in a new season of ministry for the congregation.

Calling a pastor is not the same thing as hiring an employee. The pastoral call process is not merely a search for a person with a particular set of skills. It is rather a time of discernment which will lead into a new relationship with a new shepherd for the people of God gathered for ministry in that congregation. The church understands itself as different from the world -- we are the Body of Christ -- and in prayerful consultation with one another we seek spiritual leaders to serve the whole church as pastors in particular congregations.

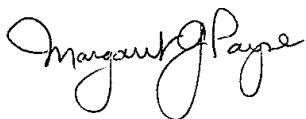
There are two reactions that are immediate and common in a congregation that is facing a pastoral vacancy: "get us a new pastor quickly," and "give us several candidates to consider." These reactions are understandable when the loss of pastoral leadership is imminent. Although it is tempting to move quickly, it is important to take sufficient time to move thoughtfully and wisely at this important time. There needs to be enough time for appropriate grieving for the pastor who has left, adjustment to change, prayer and discernment of next steps, and careful preparation and planning to move into the next pastoral relationship. This is a time when the ministry of the office of the bishop -- in the persons of the bishop, bishop's pastoral staff, and synod house staff -- is critical for the sake of the congregation. This period of transition is ripe for fresh insight into God's vision for the congregation, and we stand ready to help and support the congregation throughout the process.

In this synod, the name of one candidate at a time will be provided for a congregation's consideration. The main reason for this commitment is that it reflects our theological understanding that the central activity of the process is the prayerful discernment of a call, and not a comparison of skills among candidates. Experience has shown that candidates are better served when one name at a time is considered, and call committees who were initially resistant have expressed appreciation for a process that frees them to focus on discernment of God's will rather than comparison of candidates. A secondary consideration is that now, and for the foreseeable future, there simply are too few candidates available to offer more than one at a time.

During the time of pastoral vacancy, you can be sure that the pastoral staff and I are regularly considering your questions, concerns, and needs. This manual will provide the basic information you need to navigate this process and make yours a healthy transition. I encourage you to contact us as often as necessary, and be assured of our involvement and support.

God's blessings to you as you enter this time of transition, growth, and renewed vision.

Peace in Christ,

A handwritten signature in cursive script that reads "Margaret G. Payne". The signature is written in black ink and is positioned below the text "Peace in Christ,".

Margaret G. Payne, Bishop

HEALTHY TRANSITIONS RESOURCES FOR HEALTHY TERMINATION OF CALL

Theological Introduction

In the life, death, and resurrection of Jesus Christ, human beings are offered forgiveness of sin and eternal life. We are claimed by God through our Baptism and are made members of the church, the body of Christ in the world. This community of forgiven saints—the church—is the context within which people hear the good news of Christ, are strengthened through Word and Sacrament, and are empowered to witness and service in their daily lives. For some, God’s call to witness and service becomes more specific as they hear a call to ordained ministry.

Pastors serve in this church in a dynamic relationship with a congregation and its people, and ministry includes the entire people of God in that place. While pastors bring unique gifts for leadership, the ministry they provide is but one piece of a complex mixture of the gifts the members of that congregation possess. Ministry happens when all the gifts are in operation in that place.

When a pastor leaves a congregation, the ministry is affected. Personal relationships are altered. New roles and responsibilities become apparent. Change is never easy. Our natural reaction to change is grief, and people handle grief in a variety of ways. But, regardless of how we deal with grief in our lives, Christians have a unique resource to assist us.

This resource is the example of Jesus in his death and resurrection. We are a people who have received the benefits of a new life in Christ, and his resurrection opens the future for us. As we deal with change, we have this sense of new beginnings and rebirth to encourage us. The transitions we experience in Christ’s church are set within our understanding of Christ’s resurrection and the hope that comes from that resurrection.

Christians are constantly moving forward and reacting to the world around them through their faith and trust in God to work in the process of transition. Since the ministry in a congregation includes the entire congregation, the bulk of their strength and potential does not change as their pastor leaves. Congregations need to recognize and celebrate their inherent strength and potential even as they give thanks to God for the ministry and leadership their pastor provided during his or her tenure.

Change and transition are realities in our world, and the church of Jesus Christ is blessed to have a Savior who knows our grief and fears and loves us into his future to continue to serve him. As Easter people, we live with the encouragement of liberation, hope, and rebirth.

Congregations and pastors are partners in the process of ministry, but it is the Lord of the Church who is served by all.

HEALTHY TRANSITIONS RESOURCES FOR HEALTHY TERMINATION OF CALL

Expectations of a Departing Pastor

When a pastor resigns from his or her congregation, the relationship between the parishioners and that pastor changes significantly. Both the congregation and the pastor need to recognize this change. Pastors who have accepted a call to a new parish can balance the grief of ending this relationship with the anticipation of forming new relationships and new opportunities for ministry. However, pastors who resign for other reasons (e.g. retirement, call to special service, or on leave from call) often are reluctant to transfer their membership and believe that they and their spouses can remain as members of the congregation he or she served as pastor.

For the benefit of all, it is the expectation of the New England Synod that when a pastor resigns from a parish, he or she will transfer membership to another congregation. It is hoped that the pastor will be open to using the gifts God has bestowed on him or her in this new parish.

Parishioners who were close to their former pastor often want to continue the pastoral relationship at their family's baptism, wedding, or funeral. It is expected that pastors will decline to perform any pastoral acts in their former congregation or for their former parishioners unless requested by the pastor currently serving that congregation. We expect pastors to be cautious about involvement even when invited and to exercise good judgment.

After the resignation has been announced, but before the time of leaving, it would be helpful to include in the parish newsletter and in a few Sunday worship folders a statement that the pastor will not be available to conduct or participate in events such as baptisms, weddings, funerals, hospital calls, emergency calls, or any other pastoral functions.

Close friendships that have developed over the years do not need to be terminated. However, it must be clear that these friendships cannot include any discussion of the affairs of the parish and/or of the leadership of the new pastor with his or her former parishioners. Nor is it appropriate for the former pastor to provide any personal pastoral care.

Financial and practical issues need to be settled before a pastor leaves the congregation. Unused vacation time may be taken prior to leaving. If that is not possible, the departing pastor shall be paid for accrued vacation time. Continuing education time and monies end upon the termination of that pastorate, and the resigning pastor may not take such funds with him or her. Matters such as repayment of a housing loan or a specific date for moving from a parsonage must be agreed upon by the Congregation Council. Pastors are urged to not enter into trust or fiduciary relationships with their parishioners. However, if such a relationship exists, it should be terminated before the pastor leaves.

The presence of a former pastor at the installation of a new pastor is not recommended. After an appropriate time has passed, congregations may invite former pastors to return for special parish events and to preach occasionally.

When a problem arises, the Mutual Ministry Committee should first be consulted. If necessary the Office of the Bishop should be consulted for guidance in resolving the issue. A *Rite of Farewell and Godspeed* will help to emphasize the termination of this pastoral relationship and may be offered during the resigning pastor's last Eucharist.

Checklist for the Departing Pastor

- ___ 1) Pray first.
- ___ 2) Discuss plans with bishop and/or bishop's representative before resigning. Notify the Dean of the Conference prior to your resignation.
- ___ 3) Submit letter of resignation to Congregation Council and send a copy to the bishop.
- ___ 4) Review the *Healthy Transitions* documents, including the covenants, with your congregation's president. Arrange to discuss them at your next Council meeting.
- ___ 5) Make plans with the congregation's leadership for farewell events, including the *Rite of Farewell and Godspeed for a Pastor*.
- ___ 6) Make yourself available for members to say goodbye, including visiting and communing the homebound.
- ___ 7) Make time to say your own goodbyes as well as time for moving chores.
- ___ 8) Discuss the *Healthy Transitions* documents with the Council, after which you and the president will sign your respective covenants. Summarize the intent and details of these covenants in your parish newsletter and in a few Sunday worship folders.
- ___ 9) If resigning without another call, write to the bishop within forty-five days to request recommendation for "on leave from call" status to Synod Council for approval. Include appropriate dates and indication of new congregational membership.
- ___ 10) If retiring, contact Board of Pensions for necessary paperwork, which will include contact with the bishop and Synod Council approval. Plan for transfer of membership within six months.
- ___ 11) Inform the Board of Pensions of this change and its effective date.
- ___ 12) Make certain that the parish register is completely up to date, and then ask the president to examine these records and to send a letter to the bishop stating that they are complete.
- ___ 13) Complete all financial obligations to and from the congregation, and ask the president to send a letter to the bishop stating either that there is no indebtedness or that a mutually agreed upon repayment plan has been established.
- ___ 14) Leave a list of homebound members, including addresses and telephone numbers as well as any directions that might be helpful to the new pastor.
- ___ 15) Provide a list of upcoming pastoral acts to appropriate leadership people, including dates, telephone numbers, and other pertinent information.
- ___ 16) Contact the appropriate bishop's representative to the bishop to schedule an exit interview.

Checklist for Congregation Presidents

- _____ 1) Call the bishop's representative to the bishop to arrange a meeting with them and the congregation council.
- _____ 2) Review Healthy Transitions, Part I with the pastor.
- _____ 3) Make plans with the pastor for farewell events, include the Rite of Farewell and Godspeed for a Pastor.
- _____ 4) Discuss Healthy Transitions, Part I with the Council. Sign covenants. Summarize the intent and details of these covenants in the parish newsletter and a few Sunday worship folders.
- _____ 5) Make sure the parish register is up to date. The secretary of the congregation must submit in writing to the bishop that the parish records are in order.
- _____ 6) Submit in writing to the bishop that all financial obligations to and from the pastor are completed, or that a mutually agreed upon repayment plan has been established.

A sample of the letters mentioned above is found in the Appendix to this document.
- _____ 7) Consider forming a committee to oversee celebration of ministry, review of property and other transitional issues.

**HEALTHY TRANSITIONS
RESOURCES FOR HEALTHY TERMINATION OF CALL**

Covenant for Congregations

As Christians, we all are baptized into the priesthood of Christ to offer ourselves to the Lord of the Church in thanksgiving for what he has done and continues to do for us. It has been our privilege to support the mission and ministry of the Reverend _____ as pastor of _____ at _____.

In prayerful conversation with Pastor _____, the Congregation Council, on behalf of the congregation, has discussed the Healthy Transitions policies and expectations of the New England Synod of the Evangelical Lutheran Church in America, and we enter into the following Covenant.

We agree:

- to pray for the ongoing mission of our congregation and for our pastoral leadership;
- to respect the terms of the attached Covenant of Pastor _____;
- to incorporate both Covenants in the minutes of a called Congregation Council meeting;
- to communicate to the congregation, in writing and conversation, the terms of the Covenant, which terminates this pastoral relationship;
- to refrain from asking our former pastor to perform pastoral services, including baptisms, weddings, funerals, anniversaries, visiting the sick and homebound, etc., and to remind members to refrain from making similar requests;
- to show respect and regard for our new pastor (temporary or successor) by supporting him/her in performing pastoral duties, and to encourage parishioners to seek pastoral services from our new pastor;
- to celebrate what will be as we honor what was; and...

(Other items may be added that are consistent with the particular relationship and mission of this congregation.)

It is understood that this Covenant does not affect or require termination of friendships with individuals who are members of this congregation.

Signature of President (Vice President): _____ *Date:* _____

Witnessed by Pastor: _____ *Date:* _____

Describe how shared with congregation, including dates: _____

After sharing this Covenant with the congregation, please mail a photocopy of the completed and signed document to the office of the New England Synod, where it will be kept in the congregation's file.

**HEALTHY TRANSITIONS
RESOURCES FOR HEALTHY TERMINATION OF CALL**

Covenant for Departing Pastors

As Christians, we all are baptized into the priesthood of Christ to offer ourselves to the Lord of the Church in thanksgiving for what he has done and continues to do for us. It has been my privilege to support the mission and ministry of _____
at _____, as pastor.

In prayerful conversation with the Congregation Council of _____,
I have discussed the Healthy Transitions policies and expectations of the New England Synod of the Evangelical Lutheran Church in America, and I enter into the following Covenant.

I agree:

- to pray for the ongoing mission of the congregation and for their new pastor;
- to respect the terms of the attached Covenant of _____;
- to communicate to the congregation, in writing and conversation, the terms of the Covenant, which terminates this pastoral relationship;
- to not be involved in any leadership or advisory role (public or private) in this congregation and to refrain from behaviors that seek in any way to control the transition process, including any attempt to influence the choice of a successor;
- to refrain from language or behavior that could undermine the development of the relationship between the congregation and a new pastor (temporary or successor);
- to not support or give advice to anyone involved in a congregational disagreement;
- to refuse requests for pastoral services made by members of the congregation, including baptisms, weddings, funerals, anniversaries, visiting the sick and homebound, etc., except as invited by the current pastor, and to consult with the current pastor regarding attendance at worship and special events;
- to encourage my family members to support me in maintaining this Covenant and to support the ministry of the congregation's new pastor.

(Other items may be added that are consistent with the particular relationship and mission of this congregation.)

It is understood that this Covenant does not affect or require termination of friendships with individuals who are members of this congregation.

Signature of Pastor: _____ *Date:* _____

Witnessed by President (Vice-President): _____ *Date:* _____

Describe how shared with congregation, including dates: _____

After sharing this Covenant with the congregation, please mail a photocopy of the completed and signed document to the office of the New England Synod, where it will be kept in the departing pastor's file.

**HEALTHY TRANSITIONS
RESOURCES FOR HEALTHY TERMINATION OF CALL**

Covenant for Retiring Pastors

As Christians, we all are baptized into the priesthood of Christ to offer ourselves to the Lord of the Church in thanksgiving for what he has done and continues to do for us. It has been my privilege to support the mission and ministry of _____ at _____, as pastor.

In prayerful conversation with the Congregation Council of _____, I have discussed the Healthy Transitions policies and expectations of the New England Synod of the Evangelical Lutheran Church in America, and I enter into the following Covenant.

I agree:

- to pray for the ongoing mission of the congregation and for their new pastor;
- to respect the terms of the attached Covenant of _____;
- to communicate to the congregation, in writing and conversation, the terms of the Covenant, which terminates this pastoral relationship;
- to not be involved in any leadership or advisory role (public or private) in this congregation and to refrain from behaviors that seek in any way to control the transition process, including any attempt to influence the choice of a successor;
- to refrain from language or behavior that could undermine the development of the relationship between the congregation and a new pastor (temporary or successor);
- to not support or give advice to anyone involved in a congregational disagreement;
- to refuse requests for pastoral services made by members of the congregation, including baptisms, weddings, funerals, anniversaries, visiting the sick and homebound, etc., except as invited by the current pastor, and to consult with the current pastor regarding attendance at worship and special events;
- to transfer my membership and that of my family to another congregation upon my departure for at least three years, except in rare circumstances when the bishop may give permission for continued membership in the congregation; and
- to encourage my family members to support me in maintaining this Covenant and to support the ministry of the congregation's new pastor.

(Other items may be added that are consistent with the particular relationship and mission of this congregation.)

It is understood that this Covenant does not affect or require termination of friendships with individuals who are members of this congregation.

Signature of Pastor _____ Date: _____

Witnessed by President (Vice President) _____ Date: _____

Describe how shared with congregation, including dates: _____

After sharing this Covenant with the congregation, please mail a photocopy of the completed and signed document to the office of the New England Synod, where it will be kept in the departing pastor's file.

**HEALTHY TRANSITIONS
RESOURCES FOR HEALTHY TERMINATION OF CALL**

Optional Covenant for Departing Families

This option may be used if a spouse or other family member of a departing pastor was active in the congregation and wishes to participate in the Covenant process. It is recommended for any family member who will remain in the congregation.

As Christians, we all are baptized into the priesthood of Christ to offer ourselves to the Lord of the Church in thanksgiving for what he/she has done and continues to do for us. It has been my/our privilege to support the mission and ministry of _____ at _____ while our husband/wife/parent/child/sibling, the Rev. _____, served as its pastor.

In prayerful conversation with the Congregation Council of _____, I/we have discussed the Healthy Transitions policies and expectations of the New England Synod of the Evangelical Lutheran Church in America, and I/we enter into the following Covenant.

I/we agree:

- to pray for the ongoing mission of the congregation and for their new pastor;
- to consult with the new pastor regarding my/our involvement in the life of the congregation (for family members who intend to remain in the congregation);
- to refer requests for pastoral services to the new pastor and not to the departing pastor;
- to refrain from language or behavior that could undermine the transitions necessary for the congregation and the development of the relationship between the congregation and a new pastor (temporary or successor);
- to not support or give advice to anyone involved in a congregational disagreement;
- to support the departing pastor in maintaining his/her Covenant; and...

(Other items may be added that are consistent with the particular relationship and mission of this congregation.)

It is understood that this Covenant does not affect or require termination of friendships with individuals who are members of this congregation.

Signature(s) either of one representative of the pastoral family or of as many family members who wish to sign: _____ Date: _____

Witnessed by President (Vice-President): _____ Date: _____

Describe how shared with congregation, including dates:

After sharing this Covenant with the congregation, please mail a photocopy of the completed and signed document to the office of the New England Synod, where it will be kept in the departing pastor's file.

**HEALTHY TRANSITIONS
RESOURCES FOR HEALTHY TERMINATION OF CALL**

Rite of Farewell and Godspeed for a Pastor

This rite is designed for use on the departing pastor's final Sunday in his or her congregation.

The congregation remains standing following the Post-Communion Prayer. Representatives of the congregation join the pastor at the altar.

President (or Vice President): Pastor _____, on _____, we called you to be our pastor: to proclaim God's Word, to baptize new members into the Church of Jesus Christ, to announce God's forgiveness to us, and to preside at our celebrations of the Lord's Supper. With the Gospel you have comforted us in times of sickness and trouble and at the death of our loved ones. Sharing our joys and sorrows, you [and your family] have been important to our life together in the Church of Jesus Christ and in our service to this community.

Congregation: **The Lord is loving to everyone and God's compassion is over all God's works. All your works praise you, O Lord, and your faithful servants bless you.** (*Psalm 145:9-10*)

Assisting Minister: Let us give thanks for God's many blessings and for the life and ministry we have shared.

Congregation: **Gracious God, we thank you for the gift of your Church. By the power of your Holy Spirit you have gathered us together in love and made us your own. Here we are strengthened by your Word, nourished by your Holy Supper, and encouraged in the journey of faith by our brothers and sisters in Christ. Continue to pour out your Spirit on us, that we may proclaim the good news of your love in all that we say and do. Amen**

Sit

Pastor: Dear friends in Christ, you have called me to be your pastor and entrusted to me the responsibilities of the ordained ministry in your midst. At my installation, you presented to me the symbols of that ministry. I now return them to you, that they may be entrusted to a new leader.

The pastor and a representative of the congregation go to the font.

Pastor: I have been among you to baptize, to teach, and to forgive sins. I now relinquish the sign of this office.

The pastor gives a shell to the representative.

Congregation: **There is one body and one Spirit, just as you were called to the one hope of your calling, one Lord, one faith, one baptism, one God and Father of all, who is above all and through all and in all.** (*Ephesians 4:4-6*)

The pastor and another representative go to the pulpit.

Pastor: I have been among you to proclaim the good news. I now relinquish the sign of this office.

The pastor gives a Bible or lectionary to the representative.

(continued on next page)

Congregation: **The grass withers, the flower fades; but the word of our God will stand forever.**
(Isaiah 40:8)

The pastor and another representative go to the altar.

Pastor: I have been among you to lead worship and preside at the Holy Communion. I now relinquish the sign of this office.

The pastor gives a chalice to the representative.

Congregation: **Taste and see that the Lord is good; happy are they who trust in God.**
(Psalm 34:8)

Stand

Assisting Minister: Let us pray. Eternal God, you continually call your people to new tasks and set before them new opportunities. We thank you for your servant[s], [*Name of pastor and spouse, if appropriate*] and [their] years of ministry in your Church. By your Spirit, prosper those deeds done according to your will; and grant [them] grace to continue your work in this new season of [their] life; through Jesus Christ our Lord. **Amen**

Congregation: **Thank you, God, for the variety of ways your people proclaim your goodness and lordship. Your love that binds us together is stronger than the earthly differences that keep us apart.**

Pastor: It is time for me to go forth, having returned to you the signs of office that you presented to me at my installation. I ask that you send me forth in your love.

Congregation: **May God's blessings be with you as you go forth from us.**

Assisting Minister: Let us pray. Eternal God, you hold the times and seasons, endings and beginnings, in your hands. We give you thanks for our time together, for work accomplished, for joys and pains woven into the fabric of our common life. Grant to us all the guidance of your Holy Spirit, that fears and uncertainties about the future be transformed into the confidence that belongs to the children of God. May each day be received as a sacred trust and lived to your glory; through Jesus Christ our Lord. **Amen**

Pastor: Almighty God, Father, + Son, and Holy Spirit, bless you now and forever. **Amen**

Optional Sending Song

Assisting Minister: Go in peace. Serve the Lord.

Congregation: **Thanks be to God.**

HEALTHY TRANSITIONS RESOURCES FOR HEALTHY TERMINATION OF CALL

A Bible Study for Congregations in Transition

Transition: Passage from one stage, state, place, or subject to another: CHANGE

A. REFLECTION:

Begin by sharing your thoughts about the following. Mitch Albom, in his novel, *The Five People You Meet in Heaven*, begins with:

This is a story about a man named Eddie and it begins at the end, with Eddie dying in the sun. It might seem strange to start a story with an ending. But all endings are also beginnings. We just don't know it at the time.

1. Think of a transitional time in your life (graduation, geographical move, marriage, divorce, illness, death of a loved one, new job, promotion, children off to college, etc.,) that was experienced as an ending but later was understood as a beginning.

How did you feel at the time?

What created anxiety for you at the time?

Where did you turn for strength and comfort?

B. BIBLE READING: Philippians 4:1-9

St. Paul's letter to the Philippians gives us an opportunity to study how a leader prepares oneself and those who depend on him or her for a difficult transitional time. Paul is imprisoned and is facing death. There is a real possibility that Paul will never see again those he has taught and loved. The Philippians are facing the reality of a future without Paul at a time when there was dissension within the church and oppression from the outside. Throughout the entire letter, Paul is a model of a leader whose faith in Jesus Christ gives him joy, courage, and hope during a difficult transition.

Therefore, my brothers, you whom I love and long for, my joy and crown, that is how you should stand firm in the Lord, dear friends!

I plead with Euodia and I plead with Syntyche to agree with each other in the Lord. Yes, and I ask you, loyal yokefellow, help these women who have contended at my side in the cause of the gospel, along with Clement and the rest of my fellow workers, whose names are in the book of life.

Rejoice in the Lord always. I will say it again: Rejoice! Let your gentleness be evident to all. The Lord is near. Do not be anxious about anything, but in

everything, by prayer and petition, with thanksgiving, present your requests to God. And the peace of God, which transcends all understanding, will guard your hearts and your minds in Christ Jesus.

Finally, brothers, whatever is true, whatever is noble, whatever is right, whatever is pure, whatever is lovely, whatever is admirable—if anything is excellent or praiseworthy—think about such things. Whatever you have learned or received or heard from me, or seen in me—put it into practice. And the God of peace will be with you.

2. This is the conclusion of Paul's letter. How is Paul communicating his affection for the Philippians? What does he say about his relationship with them, and why does he say it?
3. In verses 2 & 3, Paul addresses a conflict within the congregation. Why does he do this now? How does he suggest that the conflict be resolved?
4. How does Paul suggest the Philippians move through this transitional time? What values and practices will be essential to transform this ending into a beginning? How can these same values and practices be incorporated into a transition you are facing now?
5. In verse 8, Paul suggests that the recipients of this letter intentionally focus on certain things. What are they? What dynamics, relationships, activities, and plans in your current situation could be described by the words in this verse?
6. *Whatever you have learned or received or heard from me, or seen in me—put it into practice.* Here Paul is hinting at the legacy he is leaving behind. What would you hope to be the legacy that you leave when you move from one stage, place, or condition to another? What do you want others to learn, receive, and hear from you? What do you need to learn, receive, or hear from others who may be leaving you and your circumstances?

C. FURTHER STUDY

The Bible is a compilation of “passage” stories. God's people are described as those who are always experiencing change. They move from place to place, from doubt to faith, from life to death and to life again. Think about the great heroes in both the Old and New Testaments: Moses, Ruth, Elijah, Jeremiah, Mary and Joseph, the disciples, Jesus, etc. Read about how they faced the difficult transitions in their lives. What resources did they rely on? How did each of them communicate their values to those who were affected by the transition? How did each of these biblical “endings” become a “beginning”?

D. REFLECTION ON OUR PRESENT SITUATION

7. Where are we now as a congregation?
8. What have we learned in this study that will help us in the transition?
9. How have we said “goodbye” to other pastors in the past?
10. How did those pastors leave? Did they retire? Die? Leave for another call?
11. Where is God leading us as a congregation now?
12. Above is a discussion of scriptural “passage” stories. Is there one story or scriptural text that describes us?

E. A PRAYER FOR BEGINNINGS

This wonderful prayer/poem can be found in the collection, *Guerrillas of Grace* by Ted Loder and published by Innisfree Press, Inc. Read through the prayer silently.

13. What words or phrases speak to you as you contemplate transitions in your own life and the life of your congregation?
14. What are the beginnings you hope will guide you through this time of endings?
15. What is your prayer for your congregation your departing pastor and his or her
16. Close by praying for one another, your pastor, and your congregation, followed praying together this prayer/poem.

I TREMBLE ON THE EDGE OF A MAYBE

***O God of beginnings, as your Spirit moved
Over the face of the deep on the first day of creation,
Move with me now in my time of beginnings,
when the air is rain-washed, the bloom is on the bush,
and the world seems fresh and full of possibilities,
and I feel ready and full.***

***I tremble on the edge of a maybe
A first time, a new thing, a tentative start,
And the wonder of it lays its fingers on my lips.***

***In silence, Lord,
I share now my eagerness and my uneasiness
About this something different
I would be or do;
And I listen for your leading
To help me separate the light from the darkness
In the change I seek to shape
And which is shaping me.***

HEALTHY TRANSITIONS RESOURCES FOR HEALTHY TERMINATION OF CALL

Resources

People

For more information and/or assistance, contact the Bishop's representative assigned to your Conference.

Books and Audio

Note: The following items are available from the New England Synod Resource Center. The Resource Center's code for each item precedes its title.

B268. *Running through the Thistles: Terminating a Ministerial Relationship with a Parish* (Roy M. Oswald; Alban Institute)

B592. *Saying Goodbye: A Time for Growth for Congregations and Pastors* (Edward A. White; Alban Institute)

B132. *A Change of Pastors: and How It Affects Change in the Congregation* (Loren B. Mead; Alban Institute)

B509. *Beginning Ministry Together: The Alban Institute Handbook for Clergy Transitions* (Roy M. Oswald and James M. Heath and Ann W. Heath; Alban Institute)

B404. *The Elephant in the Boardroom: Speaking the Unspoken about Pastoral Transitions* (Carolyn Weese and Russell Crabtree; J-B Leadership Network Series)

B593. *Praying Our Goodbyes* (Joyce Rupp; Ave Maria Press, Notre Dame, Indiana)

B595. *Reflections on Leaving and Entering a Ministry Setting: for Pastor and Bishop's representative in Ministry* (Leadership Support, Division for Ministry, Evangelical Lutheran Church in America)

Ac563. *Ending Well, Starting Strong: Your Personal Pastorate Start-Up Workshop* (Edward A. White; Alban Institute) 6 audiocassettes and study guide

Acknowledgements

This material includes slightly and greatly edited sections of a similar document written for the Upstate New York Synod (with their permission and our thanks); the New England Synod's *Expectations for Pastors Who Have Left a Parish* (which this material is intended to replace); a rite from the New England Synod's *Calling a Pastor*, and original writing.

HEALTHY TRANSITIONS RESOURCES FOR THE TRANSITION

Meeting with Bishop's Representative

As soon as possible after the announcement of the pastor's leaving, the congregation council will meet with the bishop's representative, who will serve as the congregation's primary synodical contact throughout the call process. At this meeting, the call process will be reviewed, interim coverage for the congregation will be discussed, and other questions or concerns will be addressed. This is the time for initial questions and concerns, though the leaders of the congregation are encouraged to remain in contact with the bishop's representative on a regular basis throughout the process.

Pastoral coverage: which is right for you?

MINIMAL

Contact Pastor is frequently a local parish pastor who has agreed to provide minimum coverage for the congregation: arrange for supply preaching, attend council meetings, oversee the confirmation program, provide emergency pastoral care and arrange for visitation to homebound members, conduct or arrange for all pastoral acts, and provide guidance for the congregational leadership.

MORE

Transitional Pastor is often a retired pastor, or a pastor in a special ministry, who is willing and able to provide more hours each week to the congregation. The amount of time is variable, but usually is half time. The transitional pastor is expected to provide pastoral care, worship leadership and preaching, guidance for the congregation's education program and leadership. The transitional pastor may be a candidate for regular call, provided special provision for that possibility is made before the term begins.

SPECIAL

Intentional Interim Pastor is a pastor who has received special training to work in a congregation that has experienced a long (10 year +) pastorate, or has experienced conflict or crisis. The intentional interim will work for a specified time, usually full time for 12 to 18 months, before the next pastor is called. The intentional interim involves a mutually agreed-upon set of goals for the specific period of the interim agreement. The call process does not begin until these goals have been attained. The intentional interim pastor may not be considered as a candidate for regular call.

Information concerning the recommended compensation and suggested agreement documents for each are available in the transitional covenants on the following pages of this document. Be sure to consult the synod compensation guidelines, found on the synod website (www.nesynod.org)

The pastor serving during this period of transition has the rights and duties of a regularly called pastor, and must certify before departure that the parish records for that period have been duly examined and maintained. The pastor shall not exert influence in the selection of the regularly called pastor, and shall not be a candidate unless special provision was made for that possibility before the term began.

In conversation with the bishop's representative, the council may suggest names of persons whom they would like to be considered for work with the congregation during the vacancy. The bishop's representative will bring this information to the next synodical staff meeting, and after further consultation, the bishop shall appoint the pastor to serve the congregation.

Role of the Congregation Council during the Transition

LISTEN

During a time of pastoral vacancy, there are two critical areas of responsibility for the congregation council. First, council members must listen carefully to the questions and concerns of the congregation, and offer words of encouragement whenever possible. The members of the council should be pro-active in seeking to provide care for members, and alert the acting pastor to any special situations.

INFORM

Second, the council must be intentional about regular communication with the congregation during the call process. Besides openness to one-on-one conversations with members, there should be articles about the process in the newsletter and some kind of oral and/or written announcement made frequently to the congregation. There will be far less anxiety and a much more positive spirit if the congregation feels regularly informed about progress in the process of calling a new pastor.

PRAY

During the vacancy, the process should be lifted up in prayer each week in the Prayer of the Church. Sample prayers are suggested below. It is also beneficial to remember in prayer other congregations in the conference and throughout the synod who are in the call process, both as a petition to God and as a reminder of the partnership that all of the synod congregations share in the ministry of the Gospel.

Sample Prayers for the Time of Pastoral Transition

For the congregation:

Faithful God, in Holy Baptism you have made us your own and called us to work for the fulfillment of your reign. Look with favor upon this congregation of your people as we await a new shepherd to lead us in mission and ministry. Protect us from fears and anxieties in this time of transition, and inspire us to renewed faithfulness in witness and service. Lord in your mercy, **hear our prayer.**

For the call committee:

Gracious God, we give thanks for those who have been appointed to serve on the call committee and entrusted with the work of discerning a new pastor to guide this congregation. Grant to these men and women wisdom, patience, and the direction of your Holy Spirit, that they may exercise right judgment, and so serve you and the mission of your people here. Lord in your mercy, **hear our prayer.**

God of wisdom, in your goodness you continue to raise up faithful shepherds to serve your Church. Direct the members of our call committee as they seek to discern, on our behalf, a new leader to guide us in our mission in this place, that we may move forward together in the months and years to come in ways that are please you and build up the whole Body of Christ. Lord in your mercy, **hear our prayer.**

**HEALTHY TRANSITIONS
RESOURCES FOR THE TRANSITION**

Covenant for Intentional Interim Pastors

As Christians, we all are baptized into the priesthood of Christ to offer ourselves to the Lord of the Church in thanksgiving for what he has done and continues to do for us. It is my privilege to support the mission and ministry of _____ in _____ as intentional interim pastor.

In prayerful conversation with the Congregation Council I have discussed the Healthy Transitions policies and expectations of the New England Synod, ELCA and I enter into the following covenant.

I agree:

- to pray for my predecessor in his/her new ministry or retirement for the sake of the mission of the Church;
- to speak well of my predecessor and interpret everything he/she did in the best possible light;
- to treat my predecessor with respect as a brother/sister in Christ and valued pastoral colleague;
- to assist the members of the congregation to find comfort and come to closure after the departure of my predecessor;
- to engage the congregation in the developmental tasks of intentional interim ministry,
- namely to:
 - tell the story of the congregation’s ministry and celebrate the contributions of both lay and clergy persons who served the congregation;
 - work to maintain/enhance the congregation’s relationship with the Synod and the Evangelical Lutheran Church in America;
 - assist the congregation in any lay leadership transitions which may occur during the intentional interim period;
 - assist the congregation in making a comprehensive evaluation of its current mission and ministries;
 - assist the congregation in visioning its future mission and ministry in preparation for the calling of its next regularly called pastor.
- to engage the congregation in the developmental tasks specific to this congregation as identified by the council:
 - _____
 - _____
 - _____
 - _____
 - _____
- to preach and preside at all regular liturgies of the congregation; to provide pastoral care to members and pastoral leadership for the meetings and activities of the congregation.
- to be responsible for the parish records
- to communicate regularly with the congregation and with the Office of the Bishop as to the progress of the interim work.
- to make clear to all concerned that my service as intentional interim pastor excludes me from consideration for the regularly called pastorate of this congregation.

The congregation agrees:

- to support the work of the intentional interim pastor
- to adopt the developmental tasks outlined above
- to begin the call process for settled pastor only after the interim ministry goals and developmental tasks have been adequately achieved
- to pay the intentional interim pastor according to synod compensation guidelines and to provide pension and health insurance through the ELCA Board of Pension (if needed) and to reimburse mileage according to IRS rates (www.irs.gov). The specific compensation agreed to:
 - Salary \$ _____
 - Housing \$ _____
 - Pension/Health \$ _____
 - Vacation time _____
 - Continuing Education _____

Effective Dates of this Covenant: _____

It is understood that this covenant does not affect, or require termination of, friendships with individuals who are members of this congregation.

Signature of Pastor _____ Date _____

Witnessed by President (Vice-President) _____ Date _____

Describe manner and date shared with the congregation: _____

After sharing this Covenant with the congregation, please mail a copy of the completed and signed document to the New England Synod office, where it will be kept in the intentional interim's file and the congregation's file.

HEALTHY TRANSITIONS RESOURCES FOR THE TRANSITION

Rites of Welcome and Farewell for an Interim Pastor

These rites are intended to mark the beginning and ending of an intentional interim pastor's tenure in a congregation. If this Rite of Welcome is used, it is expected that the Rite of Farewell also will be used.

Welcome

*The congregation remains standing following the Entrance Hymn.
The president (vice-president) joins the pastor at the altar.*

President: Pastor _____, having been called by the New England Synod to interim ministry and appointed by our bishop to serve as interim pastor of this congregation, we welcome you to this ministry among us. We call upon you to preach the Word of God, to baptize, to preside at our celebrations of the Holy Eucharist and at other services, to visit the sick and infirm, to comfort those who grieve, to lead and assist us as we assess our ministry and as we discern our future service as Christ's Church, and to help us to prepare for calling a new pastor for our congregation. We pledge you our prayers and support as you assume this interim ministry among us.

Assisting Minister: Let us pray. Gracious God, we thank you for the ministry of [*name of interim pastor*] who has come among us for a time. Give him/her wisdom and strength to lead us in our mission in this place. Enable us to be open to this leadership that together we may glorify your name in all that we say and do; through Jesus Christ our Lord. **Amen**

The liturgy continues with the Prayer of the Day.

Farewell

*The congregation remains standing following the Post-Communion Prayer.
The president (vice-president) joins the pastor at the altar.*

President: Pastor _____, you have served faithfully as interim pastor of this congregation. Now, as we soon will welcome our new pastor, it is time for us to bid you farewell. We thank you for your ministry to us, and we pray for God's continued blessing as you move on to ministry in another field of service.

Assisting Minister: Let us pray. Eternal God, you continually call your people to new tasks and set before them new opportunities. We thank you for your servant, [*name of interim pastor*] and his/her years of ministry in your Church. By your Spirit, prosper those deeds done according to your will; and grant him/her grace to continue your work in this new season of his/her life; through Jesus Christ our Lord. **Amen**

Pastor: Almighty God, Father, + Son, and Holy Spirit, bless you now and forever. **Amen**

Optional Sending Song

Assisting Minister: Go in peace. Serve the Lord.
Congregation: **Thanks be to God.**

HEALTHY TRANSITIONS RESOURCES FOR THE TRANSITION

Covenant for Transitional Pastors

As Christians, we all are baptized into the priesthood of Christ to offer ourselves to the Lord of the Church in thanksgiving for what he has done and continues to do for us. It is my privilege to support the mission and ministry of _____ in _____ as transitional pastor.

In prayerful conversation with the Congregation Council I have discussed the Healthy Transitions policies and expectations of the New England Synod, ELCA and I enter into the following covenant.

I agree:

- to pray for my predecessor in his/her new ministry or retirement for the sake of the mission of the Church;
- to speak well of my predecessor and interpret everything he/she did in the best possible light;
- to treat my predecessor with respect as a brother/sister in Christ and valued pastoral colleague;
- to assist the members of the congregation to find comfort and come to closure after the departure of my predecessor and move toward the calling of its next settled pastor;
- to provide pastoral care, worship leadership and preaching, Christian education and administrative oversight during this time of transition;
- to make clear to all concerned that, unless an alternate plan has been approved, my service as transitional pastor excludes me from consideration for call as settled pastor of this congregation.
- to exert no influence on the call process.

The congregation agrees:

- to support the work of the transitional pastor
- to pay the transitional pastor according to synod compensation guidelines and to provide pension and health insurance through the ELCA Board of Pension (if needed) and to reimburse mileage according to IRS rates (www.irs.gov). The specific compensation agreed to:
 - Salary \$ _____
 - Housing \$ _____
 - Pension/Health \$ _____
 - Vacation time _____
 - Continuing Education _____

Effective Dates of this Covenant: _____

It is understood that this covenant does not affect, or require termination of, friendships with individuals who are members of this congregation.

Signature of Pastor _____ Date _____

Witnessed by President (Vice-President) _____ Date _____

Describe manner and date shared with the congregation: _____

After sharing this Covenant with the congregation, please mail a copy of the completed and signed document to the New England Synod office, where it will be kept in the transitional pastor's file and the congregation's file.

Schedule of Compensation During Transition

Supply Pastor/ weekly preaching as defined in *Compensation Guidelines*

\$175/ WEEK (additional costs may be added for 2 or more services)
[see note 1 below]

Contact Pastor/ during a pastoral vacancy

\$150/ WEEK [see note 1 below]

Intentional Interim Pastor

During a pastoral vacancy, an intentional, specially trained interim may be recommended (see page 5.) Such a pastor must be paid according to the New England Synod *Compensation Guidelines*, bearing in mind years of service and the cost of living in the area of service. [see note 2 below]

Per Diem and hourly rates

This rate is entirely negotiable and should be arranged in advance. Hourly rates are from \$20 - \$50; daily rates are \$100 -\$200. [see note 1 below]

Expenses

Mileage should be reimbursed at current IRS rates (\$.55 at this writing) and all other expenses reimbursed by voucher, at actual cost. [see note 3]

Notes for treasurers:

1. This compensation should be recorded as 1099 income.
2. This compensation should be recorded as W-2 income.
3. Reimbursements by voucher do not trigger IRS recording. No form is issued.

HEALTHY TRANSITIONS RESOURCES FOR THE CALL PROCESS

The foundation of the call process is trust. All three expressions of this church, churchwide, synod, and congregation participate in this process, trusting the others to assume their unique responsibility. The churchwide expression of the ELCA provides well-educated and prepared candidates, the office of the synodical bishop seeks a particular candidate for each congregation, the congregation call committee interviews the candidate to discern if the proposed match does exist, the congregation council builds on the recommendation of the call committee as the recommendation advances. The congregation in assembly makes the final decision to call a new pastor. All participants in the process trust the Holy Spirit to work through this process in which all participants have the same goal, discerning God's will for new leadership for the congregation.

The Ministry Site Profile

The first step in the process is the creation of the congregation's Ministry Site Profile. A Ministry Site Profile Committee of five persons shall be formed consisting of two or three members of the council and other qualified members of the congregation. These members should be persons who have the time and ability to compile an accurate portrait of the congregation. A chair shall be elected from the group, normally one of the council members in order to provide good communication with the council. The chair shall secure a copy of the Ministry Site Profile (MSP) form, available through the ELCA website, at <http://www.elca.org/Growing-In-Faith/Vocation/Rostered-Leadership/Call-Process/Call-Process-Forms.aspx> and convene the committee.

The importance of congregational input.

Although parts of the MSP can be assigned to individual members of the committee, it is important that there are times when the whole committee reviews and discusses the entire profile. Data should be collected with as much congregational input as possible, through small group discussions, surveys, or other ways to get feedback from members. It is best if the answers are concise, but it is important that they have been given thoughtful consideration and expressed in a comprehensive manner. Remember that this document is what the candidates will read as they decide whether or not to proceed in the call process with the congregation.

The final report should be submitted to the entire council for its review and possible revision and also be made available to members of the call committee. After the profile has been approved by the congregation council, a copy shall be sent to the bishop's representative, and a date set for that representative to meet with the council and call committee to review the completed mission profile, discuss the hopes and vision of the congregation and answer any remaining questions about the process. The interim/transitional/contact pastor should not attend this meeting. Once the profile is mutually agreed on, it should be posted to the ELCA database following the instructions on the form.

The Work of the Call Committee

Composition

It is not uncommon for members of the congregation to offer their services as members of the call committee. However, due to the tremendous responsibility entrusted to this group, it is recommended that the call committee should be appointed by the congregation council. If the congregation's constitution requires congregational election of the call committee members, nominations should be made by the council. It is recommended that the chair of the committee be a member of the council.

The call committee shall be composed of six regular members and, if desired, one alternate, the majority of whom do not currently serve on the congregation council. The composition of the call committee should intentionally reflect the make-up of the congregation, assuring that all the different categories of age, gender, ethnic group, and differing lengths of membership in the congregation are represented. It is good to consider a youth for this committee, assuming they will be able to attend the meetings. It is recommended that members of the same family not serve on the call committee. Committee members should not be paid employees of the congregation.

The council should appoint persons carefully, asking itself these questions about potential members of the committee:

- Is this person firmly grounded in a relationship with Jesus Christ and committed to the search process as a prayerful journey under the guidance of the Holy Spirit?
- Does this person have the respect and trust of members of the congregation?
- Is this person able to respect confidentiality?
- Is this person open to future mission possibilities for the congregation and not simply eager to maintain the status quo?
- Is this person able to listen to others' opinions, and participate in an open and respectful discussion with other members of the committee?
- Is this person a confirmed and communing member of the congregation who attends worship regularly and participates in the life of the community of faith?
- Will this person be able to attend all meetings and interviews and be able to attend worship in another setting to experience the candidate's worship leadership?

Preparation

The call committee works in partnership with the office of the bishop through the call process. The chair of this committee will be in regular communication with the bishop's representative and will be the primary contact during the initial stages of the call process. The first responsibility of the chair shall be to arrange a time for orientation of the committee. This orientation, which will prepare the committee to receive names of candidates, can take place at any time after the profile has been submitted and before the first interview with a candidate. The bishop's representative will meet with the call committee to provide the orientation, and answer questions about the process. If requested, a neighboring or retired pastor may be able to participate in a mock interview.

Once this meeting has taken place, the congregation is ready to receive the name of a candidate. The call committee should begin preparing themselves to interview the candidate. Potential questions could be requested of the congregation. While all these questions need not be used, they give the congregation a chance to assume more ownership of the process...a process which of necessity will become less public.

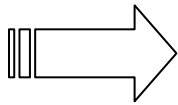
Receiving a Candidate

The call chair will be sent the name and Rostered Leader Profile (RLP) of the candidate recommended by the bishop and staff. The bishop and staff spend a great deal of time communicating with pastors within this synod who seek a change of call, interviewing potential candidates for the synod (or, occasionally, contacting one who might be open to considering a new call), and communicating with persons across the country to discover excellent candidates. There is also significant time spent in prayer, pondering and staff discussion to determine a good match between candidate and congregation. No name will be given to a call committee unless it has been determined that the person has gifts and skills that match the needs of the congregation.

Names of candidates can arise and be considered by the bishop and pastoral staff from various sources. Any member of the congregation may suggest the name of a pastor to be considered as a candidate. The chair of the call committee shall submit to the bishop any names that arise in this fashion and are considered by the call committee to be reasonable suggestions. If the pastor is rostered in another synod, the bishop of that synod must be consulted before the pastor can be approached. The bishop and staff take these suggestions seriously and pursue each one to determine if that pastor is an appropriate candidate for the congregation.

Once the staff has agreed that a candidate has the gifts and skills needed, that candidate is sent the congregation's Ministry Site Profile. Only after a pastor has given consent to be nominated will the bishop propose that person for the consideration of the call committee.

Upon receipt of the candidate's RLP, the call chair shall carefully distribute the profile to the rest of the committee, keeping in mind the importance of confidentiality.



The candidate trusts that confidentiality will be observed, and the congregation interviewing the pastor is charged with that trust. The process is meant to be confidential, but not secretive.

Information: What to share, what not to share

The call process must observe a high degree of confidentiality. There are two reasons for this. One is to protect the candidate, whose congregation may not know that she/he is considering a call to another congregation.

Members of the call committee and council are requested to take care that the candidate's documents are kept secure and to discuss information only with those who are involved in the present stage of the process. Difficult as it may seem, not even spouses should be informed of the details of the process. Also, friends and relatives who live far away should not be given confidential information. True stories abound of confidential information that traveled across the country and back again to trouble the congregation of an unsuspecting candidate.

The second important reason for confidentiality is to protect the process. If the name should become known throughout the congregation, modern communication technology allows people to find out about the candidate's background in ways that were not possible before. This could also allow members of the congregation to second-guess or try to influence the call committee decision, and in that way jeopardize the mutual trust necessary to this process.

Communication in the Congregation

While highly confidential, the call process is not to be perceived as secretive. To this end, regular communication with the congregation is essential. Newsletter updates, announcements at worship, judicious use of the congregation's website, the posting of a chart noting the congregation's progress through the steps in the process will all help the congregation know how the process is proceeding. All such notices need to focus only on the process, with no mention of anything that could identify the candidate.

Conversation with the Candidate

It is equally important to stay in regular conversation with the candidate. Members of the call committee and council should remember that this is a time of nervousness and anxiety for the candidate as well as the congregation. Both sides should take responsibility for ongoing communication, and should be sensitive to the needs of the other. If the planning of meetings or the communication of decisions is not shared promptly, there will be unnecessary anxiety and unpleasant feelings about the process.

Interviewing the Candidate: A two-step process

Upon receipt of the candidate's Rostered Leader Profile (RLP), the call chair should contact the candidate to make arrangements for the interview. The congregation is responsible for covering expenses incurred by a candidate traveling for an interview with the committee, and any subsequent visits at the invitation of the congregation. The congregation's budget should also include all the costs incurred by the call committee, such as phone, travel, meals, duplicating, and postage.

Once the call committee receives a name, two activities with the candidate constitute the interview process. The first is a meeting between the candidate and the call committee. Normally, this initial visit will not include the candidate's spouse (if married). The spouse is encouraged to visit when the candidate meets with the council.

First, the candidate meets with the entire committee. This meeting provides the first opportunity for conversation with the candidate, and normally will take place at the church. The representative of the office of the Bishop will accompany the candidate to this meeting. The reason that the bishop's representative will attend is two-fold. First, the bishop's representative can observe the interaction and responses between the candidate and committee in order to be able to provide feedback on the interview. This feedback is especially helpful if a decision is reached by one side or the other to withdraw from the process. Second, it is a time when the bishop's representative can get to know the candidate and members of the committee better, and lay the foundation for a good partnership in ministry with the synod for the future.

The call committee is free to meet with the candidate on subsequent occasions when the bishop's representative is not present. Once the committee and candidate have met personally, a second meeting could be by telephone or Skype. Members of the call committee may not visit the candidate's present congregation without the candidate's permission.

It is suggested that the candidate meet earlier with the chair of the committee, possibly including a meal, and spend time touring the church, parsonage (if one is provided by the congregation), and community. If there is no walkthrough of the parsonage at this time, provisions should be made for a tour **prior** to the interview with the congregation council. This is a good time to review the aspects of the community that are likely to be factors in the candidate's decision: housing, schools, shopping facilities, medical resources, employment possibilities for the spouse, recreation facilities, parks, etc. The candidate shall be reimbursed by the congregation for the expenses of this and any subsequent visits.

The second activity of the interview process is a visit to observe the candidate preach and lead worship. Arrangements will be made in mutual consultation, and should take place as soon as possible after the initial interview. Normally, the call committee should try to observe the candidate in his or her own congregational setting. However, it is also possible to choose a neutral site, especially if the candidate has come from a significant distance, or is not yet ordained. At this stage, the candidate does not preach at the congregation in which a call is being considered.

Following the two parts of the interview process, **the committee should share in contacting the candidate's recommendations.** This allows the committee members to ask any specific questions that may have come up during the interview.

Recommending the Candidate

After prayerful deliberation, the call committee shall determine whether or not to recommend the candidate for consideration by the congregation council. In many cases, the committee will reach consensus that the person should be recommended to the congregation to be the new pastor. If the committee cannot reach a unanimous decision, then a two-thirds affirmative vote will be sufficient to recommend the candidate to the council. The chair of the call committee shall inform the bishop's representative of the decision and request a special meeting of the congregation council in order to present the candidate.

Not Recommending the Candidate

If the call committee decides not to continue working with the candidate, the chair shall inform the candidate in writing immediately of the decision, providing some reason and relevant feedback to the candidate, and send a copy of the letter to the bishop's representative. Although it is difficult to write such a letter, it is important as information for the candidate and as guidance for the office of the bishop in determining the qualities of the next candidate. The office of the bishop will be fully supportive of a call committee that has faithfully considered a candidate, participated in both steps of the interview process, and then decided not to continue with that person. The bishop and staff shall provide the name of another candidate as soon as possible after being informed of the committee's decision.

If the candidate does not sense a call to the congregation after initial steps, she/he shall likewise inform the call committee chairperson, as well as the bishop's representative, outlining the reasons for the withdrawal.

The Work of the Congregational Council

The chair of the call committee shall communicate with the chief lay leader to arrange a meeting with the congregation council for the purpose of presenting the recommendation of the call committee. There should be a written recommendation prepared by the call committee, giving the committee's rationale for the decision and outlining the qualities of the pastor that are particularly outstanding and important to the leadership of the congregation. The chief lay leader shall preside; the pastor serving during the transition does not attend this meeting. Members of the call committee may be invited to attend.

From this point in the process, the communication with the candidate will be conducted by the chief lay leader. It will be important for the council to observe the same guidelines for confidentiality and timely communication that have been observed by the call committee.

Candidate's compensation package

Prior to meeting with the candidate, the congregation council — in conjunction with the financial officers of the congregation and in consultation with the Compensation Guidelines adopted by the synod assembly — shall develop a suggested compensation package to be sent to the candidate and to the council. A helpful form used in this process is, "Definition of Compensation, Benefits, and Responsibilities" found on page 56 of this document. A copy of the form also is sent to the representative of the Office of the Bishop. If there are any concerns regarding compensation, these should be addressed during the meeting with the council. The bishop's representative is available for consultation, and will suggest adjustments to the compensation package if needed.

Candidate's spouse and family

If the candidate has a spouse, that person might be included in a visit to the area at this time, but will not participate in the initial meeting with the council. The spouse is not being considered for call, and members of the committee and council are advised against having any particular expectations of the spouse in relation to the congregation. However, the spouse is highly regarded as the pastor's partner in life, and it is appropriate to ask questions related to the needs and role of that person in the life of the community of faith.

If the congregation owns a parsonage, the council and candidate, should discuss its upkeep, plans for any remodeling or redecorating, and any other concerns about it.

A time of social interaction may be planned with the candidate and council, and the spouse and family could be introduced to the council at this time. Plans should be made for the comfort of the spouse and family during the meeting of the candidate with the council.

The Council Meeting

The role of the congregation council at this point in the process is to receive and assume the recommendation of the call committee, trusting that the call committee is satisfied that the candidate's theology, practice of ministry, worship leadership and preaching provide the leadership the congregation needs. The council builds upon the call committee recommendation by seeking to discern if there is any reason that recommendation should not proceed to the congregation. This involves discussions of the mission of the congregation, salary, living arrangements, starting date, and other practical considerations. The back page of the Definition of Compensation document from the ELCA provides the starting point for this conversation.

After the council and candidate have had a sufficient opportunity to get to know one another and discuss the possibility of ministry together, the candidate shall be excused. The call committee may stay for fuller discussion, or may be excused. The vote of the council may be taken immediately, or may be postponed to provide time for further prayer and reflection. A two-thirds affirmative vote of the council is required to approve the recommendation of the call committee. The candidate should be informed immediately of the result of the vote, or the date on which a vote will be taken. As soon as a vote is taken, the council president should inform the candidate and the bishop's representative.

Introducing the Candidate to the Congregation

Once the council has voted affirmatively to recommend the candidate to the congregation, and the candidate has indicated her/his desire to continue in the process, plans should be finalized for a meeting between the candidate and members of the congregation. At this point, the candidate's name may NOT appear in the announcement to the congregation of the plans. In fact, the candidate's name may not appear in any mailed or internet publication until the candidate has accepted the call.

There should be two types of events planned: members should have an opportunity to meet with the pastor (and family) informally, and the congregation should also be able to experience the pastor leading worship and preaching. The congregational vote is held on the day that the candidate preaches.

A plan will be made for the candidate to meet with members of the congregation on a Saturday at an informal reception, and then lead worship in the congregation on the following morning. The candidate shall prepare a one-page biography to be available at the reception. Normally, the congregation will hold one service only that day, at which the candidate will preach and lead worship. It would be helpful to provide a time for questions and answers following the worship service at which the pastor has presided. Members of the call committee and congregation council should be prepared to respond.

Announcing the Congregational Call Meeting

The chief lay leader will arrange for the announcement of the Congregational Call Meeting in accordance with the requirements of the congregation's constitution. These normally include notification by first-class mail at least ten days, including two Sundays, in advance of the meeting (these may include the Sunday on which the vote is held). It is important that the chief lay leader consult the congregation's constitution for any other stipulations. There will be two items of business only at the meeting: a vote to call the candidate to be pastor, and a vote on the compensation package for the pastor. The bishop's representative, dean, a synod council member, or another representative authorized by the bishop will conduct the meeting.

The announcement in writing pertaining to the special congregational meeting to call a pastor shall not include the name of the candidate or any identifying information. The announcement of the meeting may be made as follows:

On Sunday, (date) following the (time) service, a special congregational meeting will be conducted to elect a pastor of the church to serve this congregation. A representative of the office of the bishop will preside at the meeting.

The candidate being recommended by the congregation council will lead the service and preach. Following the service, the meeting will be held during which a congregational vote on the candidate will take place by paper ballot. Time for questions will be provided.

A two-thirds majority is required for the election of a pastor, and no absentee ballots are permitted. There will also be a vote on the recommended compensation package for the pastor, which may be decided by voice or hand vote, and requires a simple majority. No other items of business may be conducted at this meeting.

The Work of the Congregation

As a reminder of the partnership between the congregation and the synod during the call process, the bishop's representative, the dean, a synod council member, or another representative authorized by the bishop will conduct the meeting. The chief lay leader shall be in communication with that representative of the bishop in order to ascertain that the meeting has been announced according to the constitution and that everything is in order for the day. There should be ballots, writing utensils, tellers, and an adequate number of copies of the compensation package for distribution. Plans should be made to greet the candidate and provide necessary information for the conduct of the service.

The meeting should take place immediately after the service. After time for further questions of the candidate, and an opportunity for the candidate to address the congregation if she/he desires to do so, the candidate (and family) leaves the room. Discussion may continue until there is a sense that the congregation is ready to proceed with the vote. The representative of the bishop announces the results of this written ballot. The compensation package is voted by a show of hands following this announcement. The chief lay officer shall contact the candidate as soon as possible with the number of affirmative and negative votes. If the candidate has remained at the church, it would be appropriate to call her/him back into the meeting to announce a positive vote with acclamation.

A favorable vote indicates that a call has been extended by the congregation to the candidate. The pastor-elect has thirty days in which to respond to the call. In many cases the person will respond immediately, but there are times when a pastor-elect might want to take additional time for prayerful consideration.

Document of Call

The bishop's representative will bring the Document of Call to the meeting. The chief lay leader should have the completed Definition of Compensation, Benefits, and Responsibilities of the Pastor form (included, page 55). Following an affirmative call vote, these documents are signed and brought back to the Synod Office by the bishop's representative. Assuming that the documents are in good order, and consistent with the understanding that has been reached by all parties, the bishop will attest to the call by signing the forms. The originals will be given to the newly called pastor, and copies kept at the Synod Office for filing, and sent to the congregation.

Remember that in many cases the pastor will next be involved with the announcement of the new call to her/his present congregation, and will need to take an appropriate amount of time to conclude that ministry and plan the move to a new location. It is recommended that a pastor take a minimum of two weeks transition time between calls, not including the time that the move requires. Although both the pastor and congregation will be eager to begin the new relationship, it is wise to allow time for rest and renewal before the demands of the new ministry begin.

Special Circumstances

Special circumstances apply to the calling of an associate pastor and of co-pastors. It is strongly recommended that both pastoral relations be considered co-terminus. Experience has demonstrated the difficulty inherent in replacing one partner in a co-pastorate. Associate pastors could be considered for the senior pastoral office, if recommended by the office of the Bishop. If the congregation or the pastor is not open to that possibility, the associate pastor may remain during the transition or interim. All part-time paid staff members are encouraged to offer their resignations, to be effective within six months after the arrival of the new pastor.

In calling co-pastors, the process outlined above would change only in that two people would be interviewed simultaneously.

The process for calling an associate pastor would involve one additional piece; the input of the senior pastor. It is the expectation of the Office of the Bishop that prior to giving a name to the call committee, the senior pastor would meet with the candidate for associate pastor and would have a favorable reaction to the prospect of working with that person.

Special Consideration for the Pastoral Search Process in Communities of Color

For the sake of congregations who are comprised predominantly of People of Color or who are located in communities that include a significant percentage of people whose culture is other than a white, Northern European culture, there will be an extra and intentional effort to secure a candidate who can provide the best possible leadership for that congregation and community, focusing on candidates who are persons of color.

At the beginning of the search process, there will be an assignment of one or more people who represent the anti-racism team or committee that is at work in the synod at that time. This person(s) will be understood to be a significant adviser in the process, and have voice as a representative of the Office of the Bishop in all decision-making. The call committee, representative of the bishop and anti-racism representative will work together to plan the search, and will seek consensus on each decision in the process.

It may be decided, under the direction of this anti-racism representative, that the congregation will pursue a course of prayer, study and discernment in order to prepare for the search, recruitment and selection of a candidate. This process will be conducted concurrently with the development of the Ministry Site Profile, and will be considered essential to the process. Regular, dependable and inclusive communication will be necessary to create the trust and shared wisdom to reach a mutually agreeable course of action and consideration of God's will for the leadership of the congregation. *Although these additional times of prayer, search and discernment may create a longer process, we trust that God is at work as we seek to be honest and courageous in facing the many ways that white racism and internalized racism distort God's will for the life and work of the church.*

Although the normative system allows only one candidate at a time in the pastoral search process, congregations who are actively seeking a candidate of color may consider more than one candidate in an effort to locate a person of color who might be open to God's call for the congregation. This consideration would involve the call committee, bishop's representative, and anti-racism representative reviewing Rostered Leader Profiles and prioritizing candidates to be considered by the bishop's office. When that process identifies a candidate, that person will be the sole candidate until it is decided whether or not a call will be offered. Further variations on the normative process may be considered, and can be agreed upon jointly by representatives of the congregation, office of the bishop and anti-racism representative.

HEALTHY TRANSITIONS RESOURCES FOR HEALTHY COMMENCEMENT OF CALL

Welcoming the Pastor

A committee should be appointed to coordinate the welcome of the new pastor and family. This group could first oversee any renovation that is required for the parsonage. It will surely be an important sign of the congregation's reception to the new pastor if the parsonage is freshly painted, carpets clean, all appliances in good repair, bushes trimmed and grass mowed. This group can also assist with other aspects of the pastor's relocation, and serve as a steering committee for a social time on the pastor's first Sunday, and other opportunities to get acquainted with the congregation and community.

Moving Costs

The congregation is responsible for the cost of the move. These include payment for moving personal goods, mileage for family cars, and costs of meals and motels, if the distance requires. Estimates from moving companies offering discounts should be received and the congregation invoiced directly.

In a short-distance move it may be tempting for the pastor to assume the move personally, or for a moving crew from the congregation to undertake it in order to reduce expenses. Congregations should bear in mind, however, that either has the potential of injury to persons or property, thereby straining the future relation between the pastor and congregation. If necessary, the pastor may be encouraged to carefully pack as many personal belongings as possible, thereby reducing professional moving costs.

There may be tax implications for the pastor connected with moving expenses. He/she should obtain the IRS publication 521, "Moving Expenses" and consult with his or her tax advisor.

Once the move has been planned it will also be important to provide such additional activities as hospitality to the pastor and pastor's family on moving day, assistance with settlement into the community, and an event in the congregation to welcome the new pastor. All these efforts to prepare housing, greet and welcome the pastor and family, and provide assistance will be much appreciated, and will help to assure the good beginning of a strong ministry between pastor and congregation.

Mutual Ministry /Staff Support Committee

It is strongly recommended that a Mutual Ministry Committee, or Staff Support Committee be established within three months of the pastor's arrival. This committee's primary purpose is to strengthen the pastor's ministry through careful listening and sharing, reviewing and reflecting on the shared ministry, and providing an opportunity for fuller communication with the congregation. It would be beneficial to develop goals for the ministry, and to engage in regular and mutual feedback and evaluation. It is recommended that members of the call committee serve in this capacity for the new pastor's first year.

Service of Installation

The service of installation shall be arranged by the pastor, parish musician, congregation, dean and bishop's representative. Normally the dean shall serve as the installing pastor and the pastor shall invite a preacher for the installation service. The pastor and resident musician may work together to plan any special music for the liturgy.

The bishop's representative shall assist with matters related to the transition and be available for support and guidance for the pastor and family. There shall be a visit planned to the congregation council toward the end of the first year to provide an opportunity for conversation and feedback, and to assure the pastor and congregational leadership of the ongoing support and involvement of the office of the bishop.

Visioning: Discerning a New Season of Mission and Ministry

After the new pastor and congregation have been together for six months and have gotten to know each other, the time is ripe to engage in a process of visioning together. This is a wonderful time to assess the present ministry of the congregation and to think and pray about where God is leading as the congregation goes forward in ministry with its new pastor.

This visioning may take several forms. Three are described here:

- 1) Some of the most comprehensive and in-depth models for visioning are those created by organizations such as the Alban Institute, the Ekklesia Institute or Percept. Seminars are designed using state of the art technology, detailed, current demographic data, and the focused involvement of members of the congregation. These processes require a minimum of six months – and usually longer – and normally cost at least \$2000. The return on these investments is that the results are very thorough, and at the conclusion the congregation can expect to have developed a cogent vision statement and multi-year action plan for mission.
- 2) The community organizing model has been in use for many years, particularly in urban settings. In this model, members of the congregation assume responsibility for gathering information to inform its mission both within its walls and in the wider community. Congregations that choose this model may work with a representative of the bishop's office to train members to collect data. Detailed demographic data are incorporated. This model also takes six months to a year to complete. Its chief advantages are that it encourages a congregation to become acquainted – or reacquainted – with its surrounding neighborhood and, if undertaken with care and deliberation, can bear fruit in an excellent and appropriate vision statement and action plan.
- 3) Congregations most often opt to work with a visioning mentor appointed in cooperation with the office of the bishop (in most cases a pastor or layperson who has been trained to lead such a process), who works with a visioning team in a variety of formats: a series of events, an overnight retreat, or a combination thereof. Leaders and other interested members of the congregation are trained in the fundamentals of gathering data, and encouraged to grow in the attitudes and habits of "being visionary." In this model, too, demographic information may be profitably employed. Costs are negotiated with the leader, depending on the format and duration of the process. By the end of the process, participants may expect at least a draft of a vision statement to be produced, and used later to help shape mission priorities.

Conclusion

The steps outlined in this document have provided a procedure that is orderly and helpful in calling a pastor. However, *the real work has been done by the Holy Spirit who has been present in all of the activities, and in the hearts and lives of the persons who have worked with the process*, guiding us all into a new season of ministry. We thank God for this gift of power that assists us all in fulfilling God's mission in the world in the name of Jesus Christ our Lord.

**HEALTHY TRANSITIONS
RESOURCES FOR HEALTHY COMMENCEMENT OF CALL**

Covenant for Arriving Pastors

This option may be used if an arriving pastor chooses to enter into a covenant with the congregation and its predecessor pastor.

As Christians, we all are baptized into the priesthood of Christ to offer ourselves to the Lord of the Church in thanksgiving for what he has done and continues to do for us. It is my privilege to support the mission and ministry of _____ at _____, as pastor.

In prayerful conversation with the Congregation Council of _____, I have discussed the Healthy Transitions policies and expectations of the New England Synod of the Evangelical Lutheran Church in America, and I enter into the following Covenant.

I agree:

- to pray for my predecessor in his/her ministry for the sake of the mission of the Church;
- to speak a good and positive word about my predecessor and the relationship he/she had with the congregation;
- to treat my predecessor as a valued pastoral colleague;
- to maintain my pastoral role at all times; and...

(Other items may be added that are consistent with the particular relationship and mission of this congregation.)

It is understood that this Covenant does not affect or require termination of friendships with individuals who are members of this congregation.

Signature of Pastor: _____ *Date:* _____

Witnessed by President (Vice President): _____ *Date:* _____

Date shared with predecessor pastor: _____

Describe how shared with congregation, including dates: _____

After sharing this Covenant with the predecessor pastor and with the congregation, please mail a photocopy of the completed and signed document to the office of the New England Synod, where it will be kept in the arriving pastor's file.

Sabbatical

Renewal for the Future

Policy

The New England Synod strongly encourages congregations and other organizations within the Synod to provide for and grant their pastors and other full-time rostered workers a sabbatical or renewal leave of three consecutive months after every four years of service in that setting.

The Synod also recommends that, every four years, the pastoral and lay leadership of the congregation engage its members in developing a comprehensive vision plan for the following four years. The Synod suggests that the pastor's three-month sabbatical begin shortly after the development of this plan in order that the pastor might disengage, pray, study, rest, reflect, and prepare prior to leading the congregation in its new plan. The pastor's renewal leave need not be focused specifically on the vision plan, but it is expected that the pastor will return to minister to the congregation refreshed and renewed in body, mind, and spirit.

While some congregations may choose to separate the sabbatical from the development of a vision plan, they are encouraged to engage in both activities.

A sabbatical is neither a vacation nor a time for work.

A sabbatical is not a vacation, nor is it a time for routine work, searching for a new call or a new career, or retirement planning. The pastor will be expected to commit to remaining in that congregation for a minimum of a full year following the leave.

During the renewal leave, the pastor should be paid full salary, housing, and benefits. The congregation will assume the cost of staff replacement during the sabbatical. The congregation is not required to pay for any of the pastor's costs directly related to the leave but is encouraged to include in each year's budget funds that will be set aside for the pastor's sabbatical-related expenses (e.g. tuition and other fees, travel costs, etc.) so that the pastor does not have to spend personal funds for these professional expenses. The pastor and Congregation Council should seek the guidance of the Office of the Bishop as they plan the details of the sabbatical.

A renewal leave is not to be a substitute for regular pastoral self-care and growth, but it is an important contribution toward maintaining a vibrant long-term ministry in that congregation.

The above policy assumes the typical arrangement in our Synod of a congregation with one pastor. Congregations with multiple rostered staff and those with full-time rostered lay workers are encouraged to make appropriate adjustments to the specifics in this policy and in the suggested procedures that follow later in this brochure. The Office of the Bishop and organizations within the Synod also might need to adjust some of the policy and procedural details.

Why Grant a Sabbatical?

Roy M. Oswald, a Lutheran pastor who serves as senior consultant at the Alban Institute and who has written and lectured extensively on many aspects of congregational life as well as on pastoral ministry, has offered several motivations for a congregation to want its pastor to experience a renewal leave, and his suggestions are summarized here.

A pastoral sabbatical:

- **Encourages longer pastorates.** Congregations have difficulty realizing long-term goals without having long-term pastorates. Adopting a policy for periodic renewal leave is one way to increase the congregation's chances of keeping its pastor. Whenever there is a change in pastorates, more than five years can be lost before development and growth can happen (including a few years of burnout before the pastor resigns, a transitional or interim pastorate, and a few years for the new pastor to get to know the congregation and to lead them in developing a strategic direction).
- **Contributes to spiritual growth.** Spiritual growth does not happen by accident. Growth calls for intentionally setting aside time for reading, prayer, solitude, and reflection. For some, growth may involve a study program or participating in a retreat or working with a mentor or traveling to appropriate locations or engaging for a time in a focused, non-parish ministry. Being intentional about spiritual growth is very difficult when working 45-55 hours per week. If a pastor is to provide dynamic leadership and deliver deep and challenging sermons regularly, he or she will need to get away for extended periods of time dedicated to spiritual development.
- **Refocuses ministry approaches.** A pastor not only is a spiritual leader, but is a corporate leader as well. As such, a pastor needs an astounding array of skills to be effective. In addition, parish ministry today is changing rapidly, and fresh ways must be developed to be on top of these changes and to reach new and younger persons with the message of the Gospel. A sabbatical offers an opportunity for a pastor to learn from others, to sharpen his or her skills, and to return to the congregation with new ideas and a new vitality for leadership.
- **Prevents burnout.** People in helping professions tend to burn out the fastest, in part because the constant, intimate involvement with the emotional burdens of other people's lives is very draining. Many have come to refer to this as *compassion fatigue*—a *vicarious trauma experienced by helping professionals*. A common result is that a pastor, over time, will demonstrate key characteristics of burnout—exhaustion, cynicism, disillusionment, and self-depreciation. Pastors experiencing burnout usually become dull, hollow, and uninspiring and are more likely either to seek another call or to leave parish ministry altogether. A regular schedule of sabbaticals every four years will go a long way towards preventing such results—for the well-being of both the pastor and the congregation.

- **Strengthens congregational leadership.** While some ministry tasks require ordination and others call for specific training, many tasks can be assumed by lay leaders. Granting a renewal leave to a pastor provides an excellent way for members of the congregation to develop roles within the congregation that correspond with the gifts they have been given by God.

Suggested Procedures for a Sabbatical

In congregations that are in pastoral transition, Bishop's representatives will introduce the concept of a sabbatical in the call process and will encourage the congregation to include in the call a commitment to granting a leave of three months every four years and preferably following the development of a congregational vision plan.

In other congregations, pastors are encouraged to introduce to their lay leadership the concept of a four year cycle that includes the development of an extensive vision plan for the next four years and a pastoral sabbatical of three months following the completion of that plan. Bishop's representatives are available to assist pastors in presenting such a program in their congregation. In addition, this brochure may be utilized in such an introduction.

Planning for a renewal leave should begin a year before the sabbatical, and a "time-line" needs to be developed. The pastor should present to the Congregation Council an outline showing how he or she plans to use this leave. The pastor and lay leaders should engage in specific efforts to explain the purpose of the sabbatical to the congregation as well as to develop and communicate all relevant details (e.g., pastoral coverage, assignment of responsibilities, financial adjustments, etc.).

Whether or not the pastor receives any financial assistance from the congregation for this sabbatical, he or she is encouraged to research other potential sources of funding and to apply for them as is appropriate to the specific nature of the leave. Bishop's representatives may be helpful in suggesting potential funding sources.

Within six weeks of the completion of the sabbatical, the pastor shall submit to the Council and to the Office of the Bishop a report on how the three months were used and shall share learning experiences with the congregation.

Resources for Additional Information

- Clergy Renewal—The Alban Guide to Sabbatical Planning by A. Richard Bullock & Richard J. Bruesehoff, Alban Institute, (Book)
- Why You Should Give Your Pastor a Sabbatical by Roy M. Oswald, Alban Institute, (Video with Leader's Guide)
- Journeying toward Renewal: A Spiritual Companion for Pastoral Sabbaticals by Melissa Bane Sevier, Alban Institute (Book)

The above are available from the Synod Resource Center (508-791-1530)

Pastoral staff of the Office of the Bishop of the New England Synod:
The Rev. Theodore W. Asta (508-791-1530), Associate to the Bishop
The Rev. Alice Kerr Laird (508-791-1530), Associate to the Bishop
The Rev. Tim Roser (603-662-2081), Ministry Specialist
The Rev. Paul Sinnott (860-619-0049), Ministry Specialist

This brochure was developed by the Health and Wholeness Team together with Bishop Margaret G. Payne and her Bishop's representatives. It was endorsed by the New England Synod council and was adopted by the New England Synod Assembly on June 7, 2003.

HEALTHY TRANSITIONS APPENDICES

GLOSSARY OF TERMS

Ministry Site Profile: The document that describes your congregation's history, ministry, membership, community, and leadership needs. The intent of the form is to help a congregation to call the leader that can best serve the congregation as it lives out the Good News of God in its community. The Ministry Site Profile is essential because of the role it plays in expressing who your congregation is now and what you want your ministry to look like in the future.

Contact Pastor: Usually a local parish pastor who agrees to provide minimum coverage for a congregation in transition.

Intentional Interim Pastor: An ordained pastor specially trained to assist with transition following an extended pastorate, or resolution of recent or long-term conflicts. The intentional interim is an agreed-upon period of time, usually a year or more, during which the congregation focuses on the goals established at the beginning of the interim. The call process of a settled pastor does not begin until the goals of the interim have been achieved. An intentional interim pastor is not available for call as the settled pastor.

Office of the Bishop: The Bishop, Bishop's representatives to the Bishop, Ministry Specialists, and support staff. The Office of the Bishop of the New England Synod is located at 20 Upland Street, Worcester, MA 01607 508-791-1530

Rostered Leader Profile Form: Personnel information for ordained pastors seeking a new call.

Representative of the Bishop: The Bishop's representative, Ministry Specialist, or member of the Synod Council assisting a congregation during the call process.

Synod: The gathering of ELCA congregations in a particular territory. The New England Synod is one of the 65 synods of the ELCA. Each synod, in partnership with the churchwide organization, bears primary responsibility for the oversight of the life and mission of the ELCA in its territory.

Transitional Pastor: An ordained pastor, frequently retired or in a special ministry, who provides pastoral care, administrative support, worship leadership, and Christian education assistance during a time of transition. The amount of time committed, salary, and specific duties involved are mutually agreed up prior to the transitional pastor's tenure begins.

A.

**Sample Letter
Stating Parish Records in Order and No Indebtedness
Between Pastor and Congregation**

Date

The Rev. Margaret G. Payne, Bishop
New England Synod, ELCA
20 Upland Street
Worcester, MA 01607

Dear Bishop Payne:

This is to attest that (name), the chief lay leader of (name of congregation) and (name), our conference dean, have examined the parish register and have established that the parish records are in good order.

I also wish to inform you that Pastor (name) is under no financial indebtedness to the congregation, nor the congregation to Pastor (name)

OR

I also wish to inform you that the congregation is under no financial indebtedness to Pastor (name). Pastor (name) has a financial obligation to (name of congregation). It has been mutually agreed by the congregation council and (name of pastor) that the debt will be repaid in the following manner:

Sincerely,

(Secretary of Congregation)

(Conference Dean)

B.

Sample Prayers for the Time of Pastoral Transition

On the departing pastor's last Sunday:

We give you thanks, almighty God, for the leadership of (name of pastor), for our time together, and for the work we have been permitted to accomplish together in your name. Continue to bless (him/her and his/her family) in their lives and ministries, that through them your manifold blessings might be extended to others. Lord in your mercy, **hear our prayer.**

For a retiring pastor:

Everlasting God, we give you thanks and praise for your servant, (name of pastor) and for his/her faithful ministry in your Church. By your grace may (s)he discover new opportunities for service and enjoyment of your creation; and grant that those good works (s)he has begun in your name may, by the power of the Holy Spirit, be brought to completion. Lord in your mercy, **hear our prayer.**

For the congregation:

Faithful God, in Holy Baptism you have made us your own and called us to work for the fulfillment of your reign. Look with favor upon this congregation of your people as we await a new shepherd to lead us in mission and ministry. Protect us from fears and anxieties in this time of transition, and inspire us to renewed faithfulness in witness and service. Lord in your mercy, **hear our prayer.**

For the call committee:

Gracious God, we give thanks for those who have been appointed to serve on the call committee and entrusted with the work of discerning a new pastor to guide this congregation. Grant to these men and women wisdom, patience, and the direction of your Holy Spirit, that they may exercise right judgment, and so serve you and the mission of your people here. Lord in your mercy, **hear our prayer.**

God of wisdom, in your goodness you continue to raise up faithful shepherds to serve your Church. Direct the members of our call committee as they seek to discern, on our behalf, a new leader to guide us in our mission in this place, that we may move forward together in the months and years to come in ways that are please you and build up the whole Body of Christ. Lord in your mercy, **hear our prayer.**

COMPENSATION GUIDELINES

FOR PASTORS AND LAY ROSTERED LEADERS

2012

**NEW ENGLAND SYNOD
EVANGELICAL LUTHERAN CHURCH IN AMERICA**

Developed by the Compensation Guidelines Team, March 2011
Endorsed by the Synod Council, March 2011
Adopted by the Synod Assembly, June 2011

INTRODUCTION

These guidelines are intended to be used by congregations to determine fair levels of compensation for pastors and lay rostered leaders (associates in ministry, deaconesses, and diaconal ministers; hereafter referred to as “leaders”). They may be updated each year.

Congregations are expected to establish the level of compensation for their pastors and leaders after a period of discussion, research, and evaluation. These guidelines provide one tool that should be utilized during this process to insure that the pastor’s/leader’s compensation is fair and equitable.

When compensation is appropriate and adequate, pastors and leaders will have their basic needs cared for so they can focus their attention on the ministry to which they are called. Conversely, inadequate compensation can have the effect of de-energizing pastors and leaders, which could then undermine their efforts to serve. In addition, underpaid pastors and leaders will likely have financial difficulties and tend to leave their congregations sooner than their more adequately compensated colleagues. In such situations, the congregation may discover that replacement candidates may not be willing to accept a call that might place them in financial difficulty.

Our Synod strongly encourages each congregation to maintain an active Mutual Ministry Committee. Such a committee can discuss compensation with the pastor/leader and serve as a conduit for discussion between the pastor/leader and the finance committee, Congregation Council, and congregation.

A congregation that finds it cannot meet the compensation amount called for in these guidelines and, therefore, cannot compensate its pastor fairly and adequately, must consider alternatives such as merging with another congregation, a shared pastorate, a part-time pastorate, etc. Cutting back a full-time pastor’s hours to part-time hours invalidates the original letter of call and requires negotiating a new call. Congregations facing any of these situations must contact the Office of the Bishop for advice and assistance.

DETERMINATION OF A PASTOR’S COMPENSATION

A. Defined Compensation. Compensation guidelines for pastors are outlined in Appendix A and are based on a value called “defined compensation,” which consists of:

- cash salary, social security allowance, and the Pastor’s TSA contribution (if provided);
- value of housing (for pastors provided a parsonage); and
- housing allowance and/or expenses.

This definition of defined compensation is identical to that used by the Board of Pensions. Further details regarding the calculation of defined compensation may be found at the Board of Pensions web site.

Two levels are provided: lower guidelines and upper guidelines. They represent a band in which most pastors’ defined compensation should lie. However, there is a difference in their import. The lower guidelines are to be considered minimum amounts. Congregations who are calling a new full-time pastor must meet the lower guidelines in order to have their call approved by the Bishop (except those in very specific and unusual circumstances). Congregations who already have a full-time pastor and who do not meet the lower guidelines are strongly encouraged to achieve a compensation level at or above the lower guidelines as quickly as possible. On the other hand, the upper guidelines are listed as examples of appropriate compensation and are not limits.

1. Years of Experience/Additional Education. A pastor who entered ministry later in life should be given additional credit for experience gained in another profession. Education beyond a Master of Divinity degree also should be considered. One option is to equate the advanced degree or training to a specific number of years of experience and add that amount to the pastor’s years of experience in the ministry.

2. Responsibilities/Merit. When performing an annual evaluation of a pastor's compensation, additional factors should be considered. First, have the pastor's responsibilities changed? Additional staff, larger congregation size, the assumption of an internship program, and the addition of a second pastor are factors which would indicate a higher level of responsibility for the pastor. Second, has the pastor met the expectations of the congregation? Performance is a critical consideration when evaluating compensation. A pastor who is exceeding the expectations of the congregation should be rewarded through what commonly is referred to as "merit increases." A model for an annual ministry review and performance evaluation can be found in *Pastor and People: Making Mutual Ministry Work* (Augsburg Fortress).

3. Cost of Living/Community Life Style. Cost of living adjustments based on the local economy also are appropriate for consideration. In addition, the pastor's defined compensation should be considered to be representative of the salary that the pastor would be making if employed as a professional in some related occupation. In areas where the majority of the congregation and/or community is made up of highly paid professionals, a defined compensation level near or above the upper guidelines might be appropriate.

4. Avoiding a Trap. Congregations are encouraged to not fall into the trap of giving "what we can" as such an attitude does a disservice to both the pastor and the congregation. The Congregation Council should use these guidelines and the above factors to arrive at a defined compensation figure that truly represents the value of the pastor to the congregation. The congregation should then be challenged to meet the defined compensation rather than the other way around.

B. Social Security Allowance. While most employers directly pay half of an employee's social security tax, churches are not allowed to do this for ordained clergy because of separation of church and state. However, pastors should be on a par with other employees and be given a social security allowance to pay at least half of the social security obligation. It is suggested that the allowance should be more than half since this allowance will be taxed at the self-employment rate. The pastor will pay 15.3% social security tax on income, housing, TSA, and the social security allowance. The congregation or agency is encouraged to pay half (7.65%) in order to offset this tax burden.

C. Housing. The Internal Revenue Service permits congregations to designate a portion of the pastor's compensation as a housing allowance (for congregations without parsonages) or a housing expenses and furnishings allowance (for congregations with a parsonage) which may be excluded from federal income tax.

All congregations should take advantage of this tax benefit because it provides the pastor with an effective increase in compensation equal to the tax that would be paid on that amount of income. This is a benefit that the pastor qualifies for, and it should be used.

1. Determining Housing Expenses. It is the responsibility of the pastor to provide the Congregation Council with an estimate of housing expenses. Appendix B (for congregations without a parsonage) and Appendix C (for congregations with a parsonage) provide worksheets which may be used to establish housing expenses. Designation of such expenses must be made prior to the tax year in which the allowance is to be provided. Designation of the allowance should be in the form of a letter or memo by Congregation Council action and recorded in its minutes. The Council should approve the amount requested for housing expenses unless that amount clearly is excessive. The allowance for a given year is not subject to change once approved by the Congregation Council. Any amount exceeding actual housing expenses should be reported as taxable income by the pastor.

2. Housing Allowance (for congregations without a parsonage). The amount that can be excluded from taxable income as housing allowance is always the smallest of the:

- amount officially designated in advance as "housing allowance" by the Congregation Council or
- amount spent for the pastor's primary residence (mortgage principal and interest, utilities, taxes, insurance, furnishings, appliances, maintenance, etc.) or
- fair rental value of the pastor's home, including furnishings and cost of utilities and maintenance (whether owned or rented).

3. Housing Expenses and Furnishings Allowance (for congregations with a parsonage). When a congregation provides a parsonage, the congregation should assume all costs for maintenance and utilities.

Designating a portion of the pastor's salary as a furnishings allowance allows the pastor to utilize non-taxable monies to pay for furniture and appliance purchases, wallpaper and rugs, cleaning supplies, etc. The amount that can be excluded from taxable income as a furnishings allowance is always the smallest of the three amounts indicated in C.2., above. The Board of Pensions uses 30 percent of a pastor's cash salary as the value of the parsonage to determine the contributions to the ELCA pension and other benefits program, but this calculation is not considered an expense and furnishings allowance. Furthermore, the furnishings allowance must be included in total income by the pastor when the pastor calculates social security tax.

D. Benefits through the ELCA Board of Pensions. The congregation is expected to make required contributions for each eligible employee whom the employer enrolls in the plans administered by the Board of Pensions. The amount of the required contributions is determined as a percent of defined compensation, which includes cash salary, social security allowance, 30% for housing if a parsonage is provided, and the actual housing allowance if that is provided. This amount is multiplied by the appropriate percentage to determine the cost of participation in the plan. Historically, the Board of Pensions has published its rates for the coming year during the month of August—later than the revision of these *Compensation Guidelines*, which are presented to the Synod Assembly in June of each year. Accordingly, pastors, finance committees, and Congregation Councils are encouraged to visit the Board of Pensions web site (www.elcabop.org) for current rates, calculators, other tools, and information. The Board also can be contacted by phone at 800-352-2876.

1. Medical and Dental Plans. Congregational contributions toward health coverage are based on the number of dependents. They are calculated as a percentage of defined compensation. Contributions are subject to minimums and maximums, which are provided on the Board of Pensions' schedule for contributions. Required health coverage may be waived if the pastor or spouse has other employer-provided group health coverage.

2. Retirement Plan. The ELCA Board of Pensions minimum contribution rate for participation in the pension plan is 10%, but the New England Synod, along with all the synods of Region 7, **strongly encourage congregations to designate a 12% contribution rate regardless of age or years of service.**

3. Disability Insurance. Generally, the disability plan will pay 66 2/3% of defined compensation less any amounts received from social security and worker's compensation disability benefits after two months of disability. The congregation is expected to provide full compensation including housing for the first two months of disability on a self-insured basis. The congregation also is expected to pay the medical, dental, and survivors insurance contributions during the first three months of disability.

4. Other Benefits. Survivor insurance and administrative costs are included.

E. Additional Benefits.

1. Housing Equity Allowance. When a congregation provides a parsonage, its pastor does not gain any benefit of the equity growth that the congregation may realize from its parsonage. This situation becomes particularly important when the pastor requires a significant loan for large expenses (such as payments for college tuition for children) and an equity loan cannot be obtained. Furthermore, the pastor did not gain equity through ownership of a house that can be used for retirement. Therefore, it is recommended that congregations that provide a parsonage establish a housing equity allowance for the pastor based on a minimum of 5% of cash salary, to compensate for the loss of equity growth that would be realized if the pastor owned a house. Contributions to such an allowance should be placed in an escrow account or in an optional pension fund and not provided directly to the pastor until the pastor's call is ended. Placement of the funds should be carefully examined, especially if the pastor desires to have the option of taking a loan against the accrued funds, similar to an equity loan on a house. Upon the pastor's resignation and acceptance of another call, the balance of this fund shall be transferred to the new congregation or paid to the pastor, as the pastor may direct. The fund shall be paid in full to the pastor or survivors in the event of the pastor's disability, retirement, or death.

2. Employer Contribution to TSA. Many employers provide matching contributions to investment plans and/or retirement plans such as the 401(k) plans. Congregations may consider matching a percentage of the pastor's contribution to a TSA (403B) or establishing a TSA for the pastor if no deductions from salary are elected.

3. Days Off. Synod policy, adopted by the Synod in Assembly in June 1994, states that congregations are strongly encouraged to provide full-time pastors with a minimum of two days off a week. This promotes health and well-being for the pastor, his/her family, and the congregation.

4. Vacation. The congregation is to provide four weeks of vacation (encompassing four Sundays) per year with full pay. The congregation should consider granting additional vacation time based on the length of service in the ministry.

5. Sick Leave. Sick leave is up to eight weeks per year with full salary, housing, and benefits. This is not a cumulative benefit. Sick leave thus is coordinated with the ELCA disability plan. When there is extended illness, contact should be made with the Office of the Bishop to coordinate benefits.

6. Disability Leave. When there is disability, full salary, housing, and benefits are to be paid by the congregation until the ELCA disability benefit plan takes effect (two months).

7. Family/Parental Leave. Family leave is paid time off to care for a seriously ill child, spouse, or parent. Congregations should carefully consider developing a family leave policy. Congregations are expected to provide for a paid parental leave of up to six weeks for the birth, adoption, or pre-adoption placement of a child with full salary, housing, and benefits.

8. Sabbatical Leave. Congregations and other organizations are strongly encouraged to provide for and grant their pastors and other full-time rostered and/or professional workers a sabbatical or renewal leave of three consecutive months after every four years of service in that setting. Details regarding policy, rationale, suggested procedures, and additional resources can be found in the document *Sabbatical—Renewal for the Future*, which was adopted by the 2003 Synod Assembly and which is available from the Office of the Bishop.

F. Professional Expenses. It is recommended that the congregation adopt the policy that all professional expenses incurred by the pastor(s) are reimbursed in full. These costs are not benefits and should not be considered compensation to the pastor.

1. Automobile Expenses. Each congregation should address the transportation needs of the pastor as required by its unique situation. The following list provides some examples of how transportation costs might be addressed. It is not a complete listing, and it is not meant to address every situation. Regardless of the method used in each congregation, accurate records are a must. A detailed log, together with a way to record costs for parking and tolls must be kept. (Names need not be included in the record.)

- Purchase or lease a vehicle for church-related use only. All costs of operation (repairs, insurance, etc.) would be paid by the congregation. Any personal use by the pastor would be accounted for by a reimbursement plan or as an element of compensation. There may be a tax consideration for the pastor in this case.
- Mileage allowance to be reimbursed. The pastor would maintain an automobile for which he/she would submit a voucher. The congregation would pay a per-mile amount as previously agreed by the Council. None of the reimbursed funds would be taxable since they reflect an actual cost incurred. As a minimum, the IRS rate should be used for reimbursement.
- Monthly allowance for transportation. This is the most popular method for many congregations, but it is the least appropriate. Pastors are required to keep accurate records as to the number of miles traveled or the actual expenses incurred. Failure to do so exposes the pastor to the risk of having the entire amount of the allowance included as taxable income. In addition, the possibility exists that the actual mileage may exceed the allowance, decreasing the compensation paid to the pastor. Congregations using this method should remain aware of the actual cost of transportation, and adjust the allowance.

2. Continuing Education. Continuing education time and funds should be provided for the pastor to update skills and for professional growth in order to strengthen his/her ministry. It is not vacation time. Congregations are encouraged to grant their pastor(s) two weeks and a recommended amount of \$1,000 per year (\$700

minimum). The annual cash amount may be accumulated up to three years. Note that the ELCA expects a minimum of 50 contact hours of continuing education annually. A contact hour is defined as a fifty-minute classroom instructional session or the equivalent. Continuing education may be courses, workshops, or independent study (when directed toward a specific goal). Each year the pastor's continuing education plan should be developed in consultation with the Congregation Council using a Continuing Education Covenant.

3. First Call Theological Education (FCTE). New seminary graduates are required to participate in First Call Theological Education for the first three years of their ministry. A congregation that calls a new graduate will be asked to underwrite the cost of this program (currently \$525 per year) and is expected to grant the pastor the time for this study.

4. Book and Periodical Expenses. Congregations may choose to provide an allowance for the purchase of books and/or subscriptions to periodicals.

5. Professional Meetings Expenses. A pastor's attendance at the Synod Assembly, the Bishop's Convocation, and clergy gatherings is a professional expense. The congregation is expected to provide funds to cover registration costs, lodging, meals, and travel for these activities.

G. W-2 or 1099: Which Is It? In almost every case, the congregation should be supplying the pastor with form W-2. The pastor is considered, for tax reporting purposes, a self-employed taxpayer. This means that the pastor must file appropriate returns throughout the year and remit taxes and social security contributions on a quarterly basis as if self-employed. However, the pastor is considered to be an employee by the IRS for all other tax purposes. For this reason a form W-2 is required. The congregational treasurer should exclude the value of a housing allowance or a parsonage from Box 1 of form W-2. He/she can put this amount in Box 14 of form W-2 which is merely an information box. **Note: Congregations that issue a form 1099 to their pastor could place an undue high tax burden on the pastor that is not incurred when form W-2 is used.** In all situations, it is recommended that the pastor seek tax advice from a qualified professional.

DETERMINATION OF A LAY ROSTERED LEADER'S COMPENSATION

A. Defined Compensation. Compensation guidelines for lay rostered leaders (hereafter called "leaders") are outlined in Appendix F and are based on a value called "defined compensation." With the exception of an offset in the guidelines approximately equal to the additional amount that a pastor must pay in self-employment tax, the guidelines for leaders are essentially identical to those provided for pastors.

Two levels are provided: lower guidelines and upper guidelines. They represent a band in which most leaders' compensation should lie. However, there is a difference in their import. The lower guidelines are to be considered minimum amounts. Congregations who are calling a new full-time leader must meet the lower guidelines in order to have their call approved by the Bishop (except those in very specific and unusual circumstances). Congregations who already have a full-time leader and who do not meet the lower guidelines are strongly encouraged to achieve a compensation level at or above the lower guidelines as quickly as possible. On the other hand, the upper guidelines are listed as examples of appropriate compensation and are not limits.

1. Years of Experience/Additional Education. A leader who enters ministry later in life should be given additional credit for experience gained in another profession. Education beyond a master's degree also should be considered.

2. Responsibilities/Merit. When performing an evaluation of a leader's compensation, additional factors should be considered. First, has the leader's responsibilities changed? Second, has the leader met the expectations of the congregation? Performance is a critical consideration when evaluating compensation. A leader who is exceeding the expectations of the congregation should be rewarded through what commonly is referred to as "merit increases."

3. Cost of Living/Community Life Style. Cost of living adjustments based on the local economy also are appropriate for consideration. In addition, the leader's defined compensation should be considered to be representative of the salary that the leader would be making if employed as a professional in some related occupation. In areas where the majority of the congregation and/or community is made up of highly paid professionals, a defined compensation level near or above the upper guidelines might be appropriate.

4. Avoiding a Trap. Congregations are encouraged to not fall into the trap of giving "what we can" as such an attitude does a disservice to both the leader and the congregation. The Congregation Council should use the *Compensation Guidelines* and the above factors to arrive at a defined compensation figure that truly represents the value of the leader to the congregation. The congregation should then be challenged to meet the defined compensation rather than the other way around.

B. Social Security and Housing. Because leaders are not ordained, they and the congregation each pay half of the social security tax. The leader's half is deducted from his/her pay as is done for employees of other companies and organizations. For the same reason, the government does not grant any tax-free housing allowance for leaders. If housing is provided, the value of this housing, in terms of fair rental value, may be subtracted from the general compensation to arrive at a cash salary. However, the value of the housing must be reported as income for tax purposes.

C. Benefits through the ELCA Board of Pensions. A full-time leader is entitled to the same medical and dental plans, retirement plan, disability insurance, and survivor insurance as is a pastor. (See details earlier in this document.)

D. Additional Benefits. The same benefits and considerations given to a pastor should be given to a leader, except for an equity housing allowance. (See details earlier in this document.)

E. Professional Expenses. It is recommended that the congregation adopt a policy that all professional expenses incurred by a leader are reimbursed in full. These costs are not benefits and should not be considered compensation to the leader.

1. Automobile Expenses. The congregation should provide for the same automobile arrangements for the leader as they do the pastor. (See details earlier in this document.)

2. Continuing Education/Book and Periodical Expenses. Continuing education time and funds should be provided for the leader to update skills and for professional growth. It is not vacation time. Details should be negotiated annually, and a Continuing Education Covenant should be used. In addition, congregations may choose to provide an allowance for the purchase of books and/or subscriptions to periodicals related to the leader's ministry in the congregation.

3. Professional Meetings Expenses. A leader's attendance at the Synod Assembly, the Bishop's Convocation (if applicable), and related conferences is a professional expenses. The congregation is expected to provide funds to cover registration costs, lodging, meals, and travel for these activities.

RECOMMENDED HONORARIA FOR SUPPLY PASTORS

\$175 minimum for a single service plus the *current* IRS rate for business use of one's automobile

\$75 for each additional service that week (same preparation)

APPENDIX A

2012 COMPENSATION GUIDELINES FOR FULL-TIME PASTORS

Years of Experience	Lower	Upper
0--5 Years	44,075	57,600
5--10 Years	46,840	65,700
10--15 Years	49,500	73,800
15--20 Years	52,800	81,400
20--25 Years	55,450	87,740
25--30 Years	58,120	94,700
Over 30 Years	60,680	101,370

APPENDIX B

HOUSING ALLOWANCE WORKSHEET

(For Pastors Who Own or Rent their Home)

Housing Expenses

Down payment on a home _____

Mortgage payments on a loan to purchase or improve your home (principal and interest) _____

Real estate taxes _____

Homeowner association dues _____

Rental Expenses

Rental payments _____

Housing or Rental Expenses

Property insurance _____

Utilities (electricity, gas, water, trash pickup, local telephone charges) _____

Furnishings and appliances (purchase and repair) _____

Structural repairs and remodeling _____

Yard maintenance and improvements _____

Maintenance items (household cleaners, light bulbs, pest control, etc.) _____

Miscellaneous _____

Total annual estimated expenses _____ **(A)**

Properly designated housing allowance _____ **(B)**

Fair rental value of comparably furnished home, plus utilities _____ **(C)**

The actual amount excludable from income for federal tax purposes is the lowest of A, B, or C above.

For more information, see the *Church & Clergy Tax Guide*, Christian Ministry Resources.

APPENDIX C

HOUSING EXPENSES AND FURNISHINGS WORKSHEET
(For Pastors Who Live in a Parsonage)

Housing Expenses (if paid by the pastor)

Personal property insurance _____
Utilities (electricity, gas, water, trash pickup, local telephone charges) _____
Furnishings and appliances (purchase and repair) _____
Structural repairs and remodeling _____
Yard maintenance and improvements _____
Maintenance items (household cleaners, light bulbs, pest control, etc.) _____
Miscellaneous _____

Total annual estimated expenses _____ **(A)**

Properly designated housing expenses and furnishings allowance _____ **(B)**

Fair rental value of comparably furnished home, plus utilities _____ **(C)**

The actual amount excludable from income for federal tax purposes is the lowest of A, B, or C above.

For more information, see the *Church & Clergy Tax Guide*, Christian Ministry Resources.

APPENDIX D

PASTOR'S COMPENSATION WORKSHEET
(For Pastors Who Own or Rent their Home)

Pastor's salary (Include pastor's contribution to TSA, if designated) _____

Social security allowance (if provided and not included in cash salary) _____

Housing allowance (if not included in cash salary) _____

Total defined compensation (add salary, social security allowance, and housing allowance) _____

Years of experience: _____

Defined compensation upper guideline (from Appendix A) _____

Defined compensation lower guideline _____

APPENDIX E

**PASTOR'S COMPENSATION WORKSHEET
(For Pastors Who Live in a Parsonage)**

Pastor's salary (Include pastor's contribution to TSA, if designated) _____

Social security allowance (if provided and not included in cash salary) _____

Total cash salary _____

Housing expenses and furnishings allowance (if not included in cash salary) _____

Housing equity allowance (if not included in cash salary) _____

Compensation without parsonage (add salary, furnishings allowance, and equity) _____

Total defined compensation (Multiply compensation without parsonage by 1.3%) (30% housing) _____

Years of experience: _____

Defined compensation upper guideline (from Appendix A) _____

Defined compensation lower guideline _____

APPENDIX F

**2012 COMPENSATION GUIDELINES FOR
FULL-TIME LAY ROSTERED LEADERS**

Years of Experience	Lower	Upper
0--5 Years	41,000	53,500
5--10 Years	43,560	61,100
10--15 Years	46,125	68,675
15--20 Years	49,100	75,650
20--25 Years	51,560	81,600
25--30 Years	54,020	88,150
Over 30 Years	56,375	94,300

APPENDIX G

LAY ROSTERED LEADER'S COMPENSATION WORKSHEET

Defined compensation (Cash salary) _____

Years of experience: _____

Defined compensation upper guideline (from Appendix F) _____

Defined compensation lower guideline _____

APPENDIX H

DEFINED COMPENSATION

What is defined compensation?

The sponsoring congregation or organization pays an amount based on the sponsored member's defined compensation.

Defined compensation is calculated as follows:

- (A) cash salary (before reductions for tax sheltered annuities or reimbursement accounts); *plus*
- (B) clergy social security allowance; *and*
- (C) if housing is provided, 30 percent of (A) + (B), plus housing expenses and furnishings allowance paid directly to the member, or if housing is not provided, the actual cash housing allowance paid to the member.

Defined compensation includes:

- housing equity contributions if the sponsoring congregation or organization pays them directly to the member (include in base salary);
- additional tax-sheltered annuity contributions made by way of a voluntary salary reduction agreement reached between the member and the sponsoring congregation or organization, including tax-sheltered contributions made to other financial institutions (include in base salary);
- social security tax allowance (if provided);
- housing expenses and furnishings allowance if the sponsoring congregation or organization pays it directly to the member.

Defined compensation does not include:

- housing equity contributions made on the member's behalf to the Optional Pension Plan or to another financial institution;
- housing expenses and furnishings allowance if the sponsoring congregation or organization pays these expenses directly;
- additional pension contributions (above the regular pension plan requirement) paid by the sponsoring congregation or organization on the member's behalf in addition to the member's salary;
- automobile allowance;
- continuing education allowance;
- books and periodicals allowance.

APPENDIX I

LINKS

Defined Compensation Calculator: <https://www.elcabop.org/Home/Calculators/DefinedCompensation.aspx>

Benefits Calculator: <https://www.elcabop.org/Calculators/ContributionAmounts.aspx>

IRS Home Page: <http://www.irs.gov>

DEFINITION OF COMPENSATION, BENEFITS, AND RESPONSIBILITIES OF THE PASTOR

Prepared by _____

for the Reverend _____

for the period: _____ to _____

A. COMPENSATION

The congregation will provide the following annual compensation:

- | | |
|---|----------|
| 1. Base Cash Salary | \$ _____ |
| 2. Housing Allowance <i>(if provided)</i> | \$ _____ |
| 3. Self-employed Social Security payment allowance <i>(if provided)</i> | \$ _____ |
| 4. If a parsonage or other housing is provided: | |
| a. Utilities allowance | \$ _____ |
| b. Furnishings allowance | \$ _____ |
| c. Housing equity allowance | \$ _____ |

B. PENSION AND OTHER BENEFITS

The congregation will sponsor the pastor in the Pension and Other Benefits Program of the Evangelical Lutheran Church in America, which provides retirement, disability, survivor, and medical-dental coverage. *(Sponsorship will include medical-dental coverage for the pastor's spouse and children unless they have other employer-provided group medical insurance coverage and the pastor consents to waiving medical-dental coverage for them under the ELCA Pension and Other Benefits Program.)*

1. ELCA Pension at _____ % of defined compensation
2. ELCA Medical-and-Dental Insurance *(check one below)*:

<input type="checkbox"/> a. Member only	<input type="checkbox"/> c. Member and children	<input type="checkbox"/> e. Coverage waived
<input type="checkbox"/> b. Member and spouse	<input type="checkbox"/> d. Member, spouse, and children	
3. Other insurance or benefits: _____ \$ _____
 _____ \$ _____

C. EXPENSES

The congregation will provide for the following expenses related to this pastor's ministry.

1. Automobile and travel allowance \$ _____
2. Other professional expenses \$ _____
3. Expenses for official meetings of the synod, as reimbursed
4. Continuing education *(\$1,000 recommended; minimum \$700 from calling source)* \$ _____
5. Other (_____) \$ _____
6. Pay the moving expenses to this field of service as follows: _____

D. AGREEMENT

1. Vacation time of _____ days per year, including _____ Sundays;
2. Continuing education time of _____ weeks per year *(recommended minimum of two weeks per year that may be accumulated up to three years, as reflected in a continuing-education agreement developed by the pastor and congregation council)*;
3. Participation in a First-Call Theological Education Program, where applicable;
4. Ongoing care through a Mutual Ministry Committee;
5. Up to two months of continued salary, housing, and contributions to the ELCA Pension and Other Benefits Program in a 12-month period in the event that the pastor is physically or mentally disabled; and
6. Where applicable, parental leave up to six weeks with full salary, housing, and benefits.

* Provision may be made for further unpaid time for disability recovery as agreed by the congregation, but with the stipulation that unused accumulated sick leave will not be compensated at the end of this call.

A description of the particular responsibilities of this position may be attached to this "Definition of Compensation, Benefits, and Responsibilities."

< OR THE FOLLOWING MAY BE COMPLETED >

E. OTHER PROVISIONS

Special emphases of the pastor and special encouragement by the congregation:

1. During this time period, the pastor will give special attention in ministry to the following:

- (a) _____
- (b) _____
- (c) _____
- (d) _____
- (e) _____

2. The congregation will encourage this pastor's ministry in the following ways:

- (a) _____
- (b) _____
- (c) _____
- (d) _____
- (e) _____

F. OTHER MATTERS

(Such as accountabilities, service on synodical or churchwide boards and committees, work in church-camp programs, or other such details) _____

We, the undersigned, certify that the necessary approvals of the congregation and congregational council have been granted for the provisions set forth above.

Congregation President

Council Secretary

Date: _____

I certify that I accept the above statement:

The Reverend _____ Date of signature: _____

**STEPS FOR COMPLETION OF FORM:
DEFINITION OF COMPENSATION, BENEFITS,
AND RESPONSIBILITIES OF THE PASTOR**

FIRST LINE: Prepared by _____ (Name and address of congregation)

SECOND LINE: for the Reverend _____ (Name of pastor)

THIRD LINE: for the period: _____ (Duration—normally for one year, with annual review)

A. COMPENSATION

LINE A.1.: List base cash salary.

LINE A.2.: List dollar amount of housing allowance beyond base salary. Designation of the percentage and amount of salary devoted to housing allowance must be done in an annual resolution of the congregation council's minutes. The individual pastor is finally responsible for any tax implications of the housing allowance.

Compensation does not include every expense or benefit connected with a particular ministry.

LINE A.3.: List dollar amount of any payment allowance (*if provided*) for "Self-employed Social Security."

LINE A.4.: If a parsonage or other housing is provided, consider costs of a utilities allowance (*if provided*) or other allowances (*if any*).

B. PENSION AND OTHER BENEFITS

The Pension and Other Benefits Program of the Evangelical Lutheran Church in America was established to provide the pastor with retirement, disability, survivor, and medical-dental coverage.

LINE B.1.: Indicate the percentage of contribution on the basis of the defined compensation of the pastor (salary and housing). The percentage is based on current requirements of the plan and the policy of the synod for Letters of Call.

LINE B.2.: Sponsorship will include medical-dental coverage (*where applicable*) for the pastor's spouse and children unless they have other employer-provided group medical insurance and the pastor consents to waiving medical-dental coverage under the ELCA Pension and Other Benefits Program.

LINE B.3.: List amounts of *other* insurance or benefits, if any, to be provided to the pastor, *beyond* those that are part of the pension and benefits contributions made by the congregation for the coverages provided under the ELCA Pension and Other Benefits Program (retirement, disability, survivor, and medical-dental coverage).

C. EXPENSES

Expenses are *NOT* part of the pastor's compensation. Rather, these items represent payment of costs related to the carrying out of this ministry.

LINE C.1.: Automobile expenses may be covered by a specified total annual amount or on an actual recorded mileage basis.

Other travel allowance provisions would be noted here as well.

LINE C.2.: Indicate amount (*if any*) to be provided for other professional expenses, such as an allowance for theological books and periodicals.

- LINE C.3.:* Coverage of expenses for official meetings of the synod is required.
- LINE C.4.:* Indicate amount provided for continuing education.
- LINE C.5.:* List other items and amounts to be provided for them.
- LINE C.6.:* For pastor accepting a call, define arrangements and reimbursements for moving expenses. Moving expenses normally are paid in full by the calling congregation.

D. AGREEMENT

- LINE D.1.:* Enter vacation time. Normally four weeks per year encompassing four Sundays is provided.
- LINE D.2.:* Enter time for continuing education. Minimum recommendation is indicated on the form.
- LINE D.3.:* Provision must be made for the “First-Call Theological Education Program” for recent seminary graduates.
- LINE D.4.:* This provides a reminder of the congregation’s commitment to the care exercised by a Mutual Ministry Committee (C13.04. in the Constitution for Congregations).
- LINE D.5.:* Disability leave provisions are coordinated with the ELCA Pension and Other Benefits Program and with Social Security.
- a. Up to two months of continued salary, housing, and contributions to the pension program in a 12-month period are to be provided by the congregation.
 - b. Provision may be made for further unpaid time for disability recovery as agreed by the congregation, but with the stipulation that unused accumulated sick leave will not be compensated at the end of the call.
- LINE D.6.:* Where applicable, parental leave is noted.

E. OTHER PROVISIONS

A description of the particular responsibilities of the position may be attached *or* a list may be included here indicating the areas to which the pastor will give special attention and the ways in which the congregation will offer encouragement.

F. OTHER MATTERS

Additional detail may be inserted here related to the broader responsibilities that a pastor may carry in the life of the church.



SIGNATURES

Normally, the president or vice president of the congregation signs and dates the document.

When accepting the agreement, the pastor signs and dates the document.