



SECTION 1

Pastor Resigns or Retires

'I have said these things to you while I am still with you. But the Advocate, the Holy Spirit, whom the Father will send in my name, will teach you everything, and remind you of all that I have said to you. Peace I leave with you; my peace I give to you. I do not give to you as the world gives. Do not let your hearts be troubled, and do not let them be afraid. John 14:25-27

The Resignation or Retirement of the Pastor

When a pastor announces resignation or retirement as pastor of the congregation, it can be an emotional time for the congregation. Members and friends will experience a whole host of feelings depending on their relationship to the pastor, the pastor's ministry, and the pastor's family. The congregation needs to recognize these feelings and provide for an appropriate farewell celebration of the pastor's ministry.

The congregation council's leadership is critical during these early weeks following the announcement to ensure an appropriate farewell celebration and to assure the congregation that God's Spirit will provide the strength and direction needed during the time of transition. A helpful resource entitled *The Dynamics of Transition* is included at the end of this section. The early weeks in the transition period are to be devoted to saying "good-bye" well and offering Godspeed to the pastor and his/her family. The congregation may be nervous about what is next, but it is important to be present in this moment and to say "good-bye" well.

A copy of the very important resource, *The Ethics of Pastoral Transition*, is included with the resources of this section and is to be shared with congregational leaders, members of the congregation and the departing pastor.

Receiving the Letter of Resignation

The Letter of Resignation should state the effective date of the resignation, normally about thirty days from the date of the letter. The effective date of resignation is the date after which the congregation is no longer responsible for the pastor's compensation, except in circumstances that involve severance agreements. The Letter of Resignation is presented to the congregation council, and the minutes of the council should indicate that the resignation of the pastor has been received noting the effective date of the resignation. A pastor's resignation ends the pastoral relationship, and it is unnecessary for the council to vote on the resignation; it is simply received. Both the pastor and the council president should be certain to inform the bishop immediately.

Copies of the Letter of Resignation may be sent to all members of the congregation by the pastor, or the council president may send a letter to all members of the congregation informing them of the pastor's resignation possibly enclosing a copy of the Letter of Resignation. The pastor and council should clarify the date of the last worship service to be led by the pastor, and how many weeks, if any, of the remaining time is accrued vacation time.

Vacation time is intended to be used each year, and unless there is a prior agreement stating otherwise, the accrued vacation time is for the present year only. Education time is a benefit to be used during the time the pastor serves the congregation and normally is not a consideration at the time of resignation.

Farewell for the Pastor

An appropriate farewell for the pastor and his/her family is of first importance. The council, or a task force appointed for this purpose, should immediately begin plans for the farewell celebration. This ceremony provides a fitting opportunity for members and friends to celebrate the pastor's ministry to the congregation and community, and to share remembrances of special times and events. This may also be a time to provide members an opportunity to give a financial gift of appreciation to the departing pastor.

The Liturgy of Thanksgiving at the End of a Ministry, a resource found at the end of this section, might well be used at the pastor's final worship service with the congregation.

If the congregation has Synod Parish Deacons and/or Parish Lay Ministers, the Pastor and Council should consult the Synod Handbook for this ministry to discern how the lay leader can and should serve in the time of transition.

Meeting to Review the Transition Process

Upon learning of the pastor's resignation or retirement, the council president should contact the Office of the Bishop to schedule a meeting with the council and congregation to provide an overview of the transition process. This meeting is usually scheduled prior to the pastor's departure. In preparation for this meeting, the Council President will provide the Synod Office with some recent history of the congregation, including the most recent Annual Report and YTD Finances, as well as any other pertinent insights. At this informal gathering, the bishop or the bishop's representative shares what might be expected during the transition time with the council and interested members and friends of the congregation. The departing pastor may, or may not, be present at this meeting.

The resource manual, *Walking Together Through the Transition Process*, which provides valuable resources for the congregation, is presented and reviewed. While it is impossible to determine in advance how long the transition and call process will take, it is helpful to understand more fully desired accomplishments for this time. This can be a time of great discernment and renewal of vision for the congregation.

Informal Closure Conversation with the Pastor

The leadership of the congregation and the pastor may find it useful and rewarding to have an informal time for reflection over the pastor's ministry. The council president, or other designated person, should first speak to the pastor about this possibility and the persons that the pastor desires to be present. This informal conversation could include the pastor and a few congregational leaders, or the pastor and a larger number of leaders that might include the entire council. The preferences of the pastor should be honored.

This conversation celebrates and reflects upon the partnership and mutual ministry that has existed between the pastor and congregation. It may identify areas of growth and celebration as well as incidents of difficulty and pain. A designated person other than the pastor should lead the conversation, monitor the time set aside for this sharing, and provide for an opening devotion and closing prayer. If desired, a representative of the Office of the Bishop could be present and could facilitate the conversation. The resource, *Possible Starter Questions for an Informal Closure Conversation*, is included at the

conclusion of this section. The questions are designed to engage the pastor and the congregational leaders in the conversation.

The Exit Interview

Prior to the pastor's departure, a representative of the Office of the Bishop (often the Conference Dean) will conduct an exit interview with the pastor. Representatives of the congregation may also be invited to participate in this interview. While similar to the closure conversation described above, the exit interview gathers important information for the transition time. As an ordained minister of the church, the pastor usually has considerable information and insights that are helpful to the bishop and the congregation as the transition period is entered. Information that is not of a confidential nature will be shared with the congregation council by a representative of the Office of the Bishop. A copy of *The Exit Interview* generally used by the Office of the Bishop is included in the resources at the end this section.

The Office of the Bishop also assures that the constitutional requirement that congregational records be reviewed and certified as accurate and in good order is met. The resource, *Certification of Congregational Records*, may be found at the end of this section.

Congregational Consultation

In some circumstances, the congregation council or Office of the Bishop will determine that it would be helpful for the Office of the Bishop to provide consultation with the leadership of the congregation. This might be especially true if the pastor's departure was sudden and unexpected. It would certainly be true if the departure involved conflict or discipline.

The shape and form of this consultation would be agreed upon by the Office of the Bishop and the council. It could include multiple meetings that would involve congregational leaders and a large segment of the congregation. Sometimes the bishop will recommend specially trained coaches or consultants to facilitate the conversations and provide guidance through difficult circumstances. Such consultation is designed to help the congregation move forward into the transition period and toward the calling of a new pastor. Additional information related to consultation will be found in Section 2 of this manual.

Paths Forward

We recognize that not all congregational systems are equal, and that a single process for transitions may not serve all congregations well. At the same time, we are mindful that even congregations that are relatively healthy will have group dynamics change significantly when pastors or other leaders depart. While this manual does speak to the importance of interim time, the transition process allows for at least several possible paths forward:

Typical Transitions can last for 1-2 years after a Pastor's departure. Many years of experience has shown the importance of intentional transition time, to offer the clarity of discernment towards God's future. See Resource *The Dynamics of Transition*. This transition time will most often be guided by an Interim Pastor, with the congregation's leadership actively engaging in the discernment process. The *Transition Process Checklist* is a helpful tool for engaging in this work.

When the future is uncertain, the path to future pastoral leadership is more complicated. Often leadership transitions occur during moments of congregational vulnerability, financial stress, and reduced

resources, all of which shape the congregation's path forward. In consultation with the Office of the Bishop, vulnerable congregations will need to first enter into an intentional discernment process about stewarding the congregation's resources, connecting with the community, and questions of long-term sustainability. Potential outcomes might include (but not limited to) vitality work, clarity of mission, shared ministry, increased partnerships, or steps toward legacy and holy closure. In this case, the congregational council and members must discern steps toward a sustainable future before (if ever) a call committee can discern the right leader (shared Pastor, full-time Pastor, part-time Pastor, other options).

Occasionally, some congregations, identified by the bishop's office in consultation with the congregation in transition, may be able to move more quickly through some of the steps of the transition process once a pastor departs. The bishop's office will be responsible for helping congregations identify which steps can be worked through more quickly with more targeted interim milestones.

Transitions while the pastor is still in place Some congregations, after consultation with the Office of the Bishop, may wish to begin the transition process while the pastor is still in place but without bringing on any additional staff. The goal here would be to have the new pastor start as quickly as possible after the departure of the predecessor pastor. The bishop's office will develop a process that helps healthy congregations (and leaders) work through the check list and some of the transition tasks while the pastor is in place. Assessments and safeguards should be included to ensure that the work is done with integrity and independent of the overt influence of the existing pastor.

Succession Planning Some larger congregations, in consultation with the Office of the Bishop, may choose to do some succession planning that includes bringing on a second pastor who is a possible successor to the pastor. While rare, this may be a possible path in the transition process provided care is taken in defining what the transition will look like and providing opportunities for future discernment on all sides. Understanding that co-terminus situations are the norm and often the best arrangement for the congregation, succession planning would require an exception to the co-terminus policy through consultation with the Office of the Bishop and with ratification by the Synod Council upon an exception moved by the bishop.

Calling of Transition (Term Call) Pastor to Serve as Interim

In some situations, it may be determined in the consultation between the congregation council and representative of the Office of the Bishop that, in light of special congregational circumstances, it is desirable to extend a term-call to a transition pastor rather than appointing an interim pastor. The calling of a transition pastor provides for an extended interim situation that has a predetermined length of time or term, usually three years in length. As with interim pastors, the transition pastor serves as an extension of the leadership and pastoral care of the Office of the Bishop during the transition between the former pastor and the calling of a new pastor to serve the congregation.

In addition to addressing the five primary areas of focus of interim ministry, a transition pastor may be asked to assist the congregation and congregational leadership in placing particular focus on areas of need for the future vitality of the congregation including ministry assessments and visioning processes. Matters described above related to interim pastors also generally apply to transition pastors.

Assessment Prior to Conclusion of Term Call

About six months prior to the end of the term-call of the transition pastor, an assessment meeting that includes the congregation council, the transition pastor and a representative of the Office of the Bishop is

scheduled to determine preferred next steps. At this point, a decision may be made to recommend one of the following courses of action to the congregation:

- The goals/tasks of the transition period have been satisfactorily accomplished, and it is recommended to the congregation that a call committee be appointed to begin the process for the calling of the next pastor to serve the congregation. The term-call of the transition pastor will reach its conclusion as previously determined.
- There remains significant work to be done regarding the goals/tasks of the transition period, and it is recommended to the congregation that the term-call of the transition pastor be extended one additional year.
- The relationship between the transition pastor and the congregation has developed in such a way that the congregation desires to develop a mission site profile and give consideration to the potential of calling the transition pastor to serve as its next called pastor. The transition pastor also desires to explore this possibility and completes a Rostered Minister Profile. After review and at the appropriate time, a special congregational meeting would be scheduled to call the transition pastor as pastor of the congregation.

Intentional Blank Page

Resource A
The Dynamics of Transition

By the Rev. R. Richard Armstrong, LMFT, and the Rev. Thomas L. Weitzel

What to Expect for Your Ministry

Your pastor has resigned or retired. Suddenly it is a new day. It may have come unexpectedly. Or it may have been announced many months ago so that the congregation could prepare. In either case, the day that your pastor leaves, it is a new and changed situation. The transition has begun. Being in Transition means:

- An *Ending* has taken place.
- There is a *Time in Between*
- A *New Beginning* has not yet occurred.

Transitions are about the Time in Between. How do we experience these times?

Just as congregations are made up of a variety of people, so it is that people may experience the transition in a variety of ways. Transitions can be a time of joyful anticipation and planning for the new ministry to come (like Advent, like pregnancy). For others, it can be a period of anxiety and confusion because of the transitory nature of the period. Yet others will be working their way through the typical stages of grief over the loss of their pastor: denial, anger, bargaining, depression, acceptance.

In all cases, the time in between is a *changing situation*. The comfort and contentment of normal routine left with the last called pastor (= the *Ending*). Everything is in a state of *Becoming* prior to the *New Beginning*.

The Old Testament gives us a helpful example of transition in scripture in the story of the Exodus of the Israelites from slavery in Egypt to go to the Promised Land of Canaan. The Exodus was the *Ending*. The Wilderness Experience as the Transition, the *Time in Between*. And the Promised Land was the *New Beginning*. From these stories we learn that the promised new beginning is always filled with hope that aids transitions for the people of God.

We also learn from the Wilderness story that in God's hands, transitions can be *Transformational*. The Wilderness experience was a time of *re-forming* as a people of God (Ex. 6:7). It was a time for faith renewal and learning to trust God (Num. 14:20f). It was also a time of testing that faith (Ex. 20:20). The Israelites came out of that wilderness strengthened as God's people.

It wasn't always easy however. The experience of the Wilderness for some included: frustration and dissatisfaction (Ex. 15:24), complaining (Ex. 17:3), uncertainty about the future (Num. 14:1-

4), disillusionment with leaders (Ex. 16:2), even desires to “go back (Num. 14:4). That can occur for God’s people in transition even today.

But this was also true: At every turn in the Wilderness, God addressed the needs of his people (Ex. 15:25, 16:5, 17:6). Following and trusting God got them through the uncertainty of the Wilderness to the Promised Land (the *New Beginning*).

So it is that “during the transition period, a congregation can reflect, renew, grow and learn about itself. Rather than simply a time to put everything on hold, or maintain the ‘status quo’, the transition time is an opportunity for the congregation and interim pastor to do many things in preparation for the start of a new pastor’s ministry” (Section 2, Page 2).

That last phrase is key to understanding the focus for the interim period: doing “many things in preparation for the start of a new pastor’s ministry.” Like Advent, preparing for Christmas. Like pregnancy, preparing for that new and life-changing blessed event that is about to happen. The focus, including any changes that may occur, is preparation for the *New Beginning*.

For leaders of congregations, it is helpful in transitions to do these things: Stay focused on your vision. State and publish expectations for the transition time. Communicate widely. Call informal congregational meetings to discuss progress as needed. Expect to be challenged but understand it for what it is: a changing situation in the state of becoming. Stay on course.

Always remember: No matter what happens, everyone will be OK! We are safe in our relationship with God through faith in Christ Jesus (Rom. 8:37-39). The God who led the Israelites through the Wilderness to the Promised Land will also lead our congregation to the *New Beginning* of God’s own making.

Resource B

The Ethics of Pastoral Transition

Congregations and pastors need to understand the professional ethics of ministry relating to former pastors, interim pastors, current pastors and retired pastors. A pastor who resigns or retires from a congregational ministry setting no longer serves as pastor to members of this congregation. Former pastors should not agree to pastoral responsibilities that rightfully belong to the current pastor of the congregation.

The PURPOSE of this paper is to clearly state the proper boundaries for former pastors, interim pastors, retired pastors, current pastors, and members of congregations relative to on-going pastoral responsibilities and duties.

Former Pastors

If a former pastor is asked to officiate at a special service by members, he/she should respond immediately by saying: “Thank you very much for asking me, but it is simply NOT appropriate for me to do that since I am no longer your pastor.” The former pastor then encourages them to call their present pastor.

It is very natural that members turn again to a former pastor who perhaps baptized their other children or performed other weddings and funerals for family members while serving as the family’s pastor. Again, with great sensitivity and love, the former pastor should graciously decline and direct the family to their current pastor. As with other family friends, the former pastor might attend the service as a guest.

Former pastors should avoid the comment to members, “You’ll need to speak first to your present pastor about me doing this.” Such a comment places the current pastor in the very awkward situation of having to relinquish the pastoral role to the former pastor or saying no to the members’ request and thus appearing insensitive, uncaring or insecure.

Former pastors who retire need to promptly transfer their membership to another Lutheran congregation where they can become involved as a retired pastor. This is also a great gift to the congregation formerly served.

Please note this section of the Synod’s Constitution, that is consistent in every Synod of the ELCA:

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

In this age of extensive social networking on-line in its many forms, former pastors need to be aware and sensitive about their on-line communications. Continuing to “copy” members of their former congregation in emails or Facebook interactions is a form of continuing pastoral interactions/relationships. On-line interactions are to be discontinued. Be sure to remove past parishioners from your batch email lists and Facebook access.

Interim Pastors

The interim pastor is the current pastor of the congregation until that time comes when the new pastor assumes the role of pastor and shepherd of the congregation. Whether part time or full time, the interim pastor should be contacted for all pastoral acts during the transition time. The former pastor should not be contacted by members to return to perform a pastoral responsibility during the transition.

Current Pastors

Current pastors should speak as positively as possible of the ministry of former pastors even though their style and vision might be very different. The current pastor should never feel pressured to relinquish his/her pastoral role to a former pastor. When a current pastor feels it is appropriate and healthy to invite a former pastor to return to participate in a special occasion, worship or activity, he/she can certainly extend such an invitation.

Retired Pastors Who Join a Congregation

Retired pastors who join congregations can be a blessing to the congregation. Retired pastors need to remember that they come with experience and gifts for ministry and may be asked to share such gifts at the invitation of the current pastor. Retired pastors need to be supportive of the current pastor. Should retired pastors have concerns about the current pastor or feel they are unable to be supportive of the current pastor, they are to call the bishop rather than to share their unsupportive viewpoints with the leadership or congregation. It is strongly suggested that retired pastors and their spouses do not serve on council.

Members & Friends of the Congregation

Members should avoid placing both the current and former pastors in awkward positions by seeking the pastoral services of a former pastor. Members should simply not ask for such favors from former pastors. By showing high regard to the current pastor, members affirm the significance of the pastoral office which was once held by the former pastor.

If the congregation, council or current pastor experience difficulties with proper boundaries being maintained, the bishop should be contacted.

Please copy this paper and distribute as appropriate.

Outgoing Pastor Must Sign Below

Return a signed copy to the Synod office tinaf@fbsynod.org and keep a copy for your records.

Print Name: _____

Signature: _____ Date: _____

Resource C

Thanksgiving at the Conclusion of a Call

This order is appropriately set within the service of Holy Communion on the final Sunday of a minister's service under call in a congregation. The order follows the prayer after communion.

This order may be led by a pastor of the congregation (unless the pastor's call is the one concluding), another rostered leader, a representative of the congregation, or a representative of the synod.

ADDRESS

The person whose call is concluding and a representative of the Florida-Bahamas Synod and the congregation come before the assembly. A representative of the congregation addresses the pastor whose call is concluding with these or similar words.

_____ (Pastor's name), on _____ (date), we of _____ Lutheran Church called you to be pastor in this place: to proclaim God's word, to baptize and teach, to announce God's forgiveness, and to preside at the Lord's table. 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, in our service to this community, and in God's mission to the whole world. As you leave this community of faith, we say farewell, and we pray for God's blessing.

The Representative of the Bishop addresses the assembly with these or similar words.

People of God, members of _____ Lutheran Church, do you release _____ (Pastor's name) from service as your pastor?

We do, and we give thanks to God for our ministry together.

The Representative of the Bishop addresses the person whose call is concluding.

_____ (Pastor's name), do you recognize and accept the completion of your ministry with _____ Lutheran Church?

Response:

I do, and I give thanks to God for our ministry together.

THANKSGIVING AND SENDING

A representative of the congregation leads the congregation in prayer.

Let us pray.

Almighty God, through your Son Jesus Christ you gave the holy apostles many gifts and commanded them to feed your flock. You equip your people with abilities that differ according to the grace given to

them, and you call them to various avenues of service. We give you thanks for the ministry of _____ (Pastor's name) among the people of God in this place.

You watch over our going out and our coming in:
bless this time of ending and beginning.
You surround your people in every time and place:
keep us close in your love.

You accompany your people in times of joy and times of trial:
prosper all that has been done to your glory in this time together;
heal and forgive all that has fallen short of your will for us.
Help _____ (Pastor's name) and all of us
to live with courage and gladness in the future you give to us.

As he/she/they has been a blessing to us,
so now send him/her/them forth to be a blessing to others;
through Jesus Christ, our Savior and Lord. **Amen.**

The Representative of the Bishop addresses the pastor and congregation.

Your sisters and brothers in Florida-Bahamas Synod and the Evangelical Lutheran Church in America
give thanks to God for the ministry you have shared. We promise you our continued support and prayer.

Rejoicing in the blessings of God in this congregation and in the ministry of _____ (Pastor's
name) with hope in God's abundant grace in years to come, I announce that _____ (Pastor's
name) service as pastor in this congregation is now concluded.

BLESSING

The pastor whose call has concluded, proclaims God's blessing in these or similar words.

The Lord bless you and keep you.
The Lord's face shine on you with grace and mercy.
The Lord look upon you with favor and + give you peace. **Amen.**

A sending song may be sung.

DISMISSAL

The assisting minister may send the assembly into mission.

Go in peace. Serve the Lord.
Thanks be to God.

Resource D

Possible Starter Questions for an Informal Closure Conversation

This conversation is to celebrate and reflect upon the partnership and mutual ministry that the pastor and congregation have shared. Someone other than the pastor should lead the conversation monitoring the agreed upon time for this sharing. This conversation may take place with the council. If desired, a representative of the Office of the Bishop could be present and may facilitate the conversation.

The designated leader might also provide an opening devotion and closing prayer. The questions below are designed to help focus the conversation.

Some possible starter questions that might be asked of the members present:

- Which of Pastor's gifts are you personally most thankful for?
- Would you share a personal or special memory or event involving the pastor that has special meaning to you?
- Is there a humorous event or recollection, not too embarrassing, that you might share?
- How will the Pastor be remembered by you?
- What lasting treasure has the Pastor given to this congregation?
- Some possible starter questions that might be asked of the pastor
- What were some of your hopes & dreams for this congregation when you began your ministry among us?
- What was your greatest joy during your ministry here?
- Would you share your greatest sorrow or disappointment in your ministry?
- What accomplishments are you most proud of relating to your ministry here?
- What do you see as this congregation's greatest strengths?
- Any concerns or parting words of wisdom that you'd like to share with us?

Intentional Blank Page

6. Do you have any concerns about the congregation's current staffing situation?

7. Are there issues that you feel this congregation needs to address before calling a new pastor?

8. Are there any other issues that you feel the Office of the Bishop needs to know?

9. Have the following items been tended to:
 - Listing of those who are sick or hospitalized? Who has this information?

 - Are there marriages or baptisms schedules? Who has this information?

 - Other continuing care issues? Who has this information?

 - Who will handle classes you have been teaching (catechism, Bible, etc.)?

 - Have you reviewed the congregational records, including the parochial records, with the secretary of the congregation and has the secretary signed the certification of this?

Completed form is to be copied to the departing pastor and forwarded to the Office of the Bishop.

Resource F

***Certification of Congregational Records
at the time of Pastoral Transition***

In accordance with the Constitution and Bylaws of the Florida-Bahamas Synod which states:

“The pastor shall keep accurate parochial records of all baptisms, confirmations, marriages, burials, communicants, members received, members dismissed, or members excluded from membership” (S14.03.a), and further, “The parochial records of each congregation shall be kept in a separate book that shall remain the congregation’s property. The secretary of the congregation shall attest to the bishop of this synod that such records have been placed in his/her hands in good order by a departing pastor before: a. installation in another field of labor; or b. the issuance of a certificate of dismissal or transfer.” (S14.15.)*

This certification testifies to the fact that the departing pastor has kept accurate parochial records, and that such records have been reviewed and found in good order by the secretary of the congregation.

Name of Congregation: _____

Address of Congregation: _____

City: _____

Departing Pastor Signature

Secretary of the Congregation Council

Date: _____

This certification should be mailed to the bishop of the Florida-Bahamas Synod at 3838 West Cypress Street, Tampa, FL 33607. The departing pastor and the secretary of the congregation should retain copies of this certification.

*Or electronic file.

Intentional Blank Page

Resource G

Guidelines for Retired Ordained Ministers

Ordained ministers may retire upon attainment of age 60, or after 30 years on the roster of ordained ministers of this church or one of its predecessor bodies, or upon disability, and continue to be listed on the roster of ordained ministers of this church, upon endorsement by the synodical bishop, by action of a Synod Council in the synod in which the ordained minister is listed on the roster . . . (bylaw 7.41.17. in the Constitutions, Bylaws, and Continuing Resolutions of the Evangelical Lutheran Church in America).

Persons who have served within the ordained ministry of the Evangelical Lutheran Church in America and who have determined that they will enter retirement are not only to be honored for their past service but are seen as important resources for ministry within the life of this church. To enter this new phase of one's life is always a significant milestone. It is a transition into another important stage of life for every retired person. It is true also for the retired pastor (and spouse/partner if the pastor is so blessed). The following statement is a guideline for retired pastors, the congregations they served, and synodical bishops in understanding the new status of a retired pastor. It is intended to affirm the past ministry of retired pastors, to give directions which seek to avoid some pitfalls that can present themselves to the retired pastor, and to point to new arenas of service and support.

I. ROSTER OF ORDAINED MINISTERS

A retired pastor is on the roster of the synod in which last under call or in which the pastor resides. The retired pastor remains accountable to the synodical bishop where rostered. A retired pastor must be a member of an ELCA congregation in order to remain on the roster of ordained ministers and remains subject to the standards for ordained ministers of this church.

II. CONGREGATIONAL MEMBERSHIP

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

III. PASTORAL SERVICE

At the time of retirement, a pastor is no longer pastor of a congregation and therefore must discontinue the functions of the pastoral office in the congregation unless specifically authorized to do so. The service of retired pastors is governed by the *Constitution for Synods* [†S14.14.], which describes the role of ordained ministers in congregations in which they do not serve: "Ordained ministers shall respect the integrity of the ministry of congregations which they do not serve and shall not exercise ministerial functions therein unless invited to do so by the pastor, or if there is no duly called pastor, then by the interim pastor in consultation with the congregation Council" (†S14.14. in the *Constitution for Synods of the Evangelical Lutheran Church in America*).

IV. INTERIM MINISTRY

One area of potential service for the retired pastor is interim ministry. Many retired pastors provide valuable and needed ministry to congregations in time of transition following the resignation of a pastor. The Evangelical Lutheran Church in America invites retired pastors to consider this important arena of ministry. A retired pastor may serve as an interim pastor during a time of pastoral vacancy only by the authorization of the synodical bishop. Retired pastors who wish to serve under call in an interim ministry must return to the active roster of ordained ministers.

V. COMPENSATION

Retirement benefits provided by the Evangelical Lutheran Church in America through the Portico (formerly Board of Pensions), combined with Social Security benefits, are intended to provide adequate compensation to pastors in retirement. Therefore, there shall be no financial commitment by a congregation or agency to retired pastors or their spouses/partners.

- A. A retired pastor who is authorized to serve (not under call) in a congregation for a stated period and for pastoral services may be compensated according to compensation practices within the synod.
- B. The title of Pastor Emeritus has no official standing and carries with it no compensation or authorization for service or for other responsibilities.

VI. CONSULTATION WITH SYNODICAL BISHOP

As part of the bishop's pastoral care of retired pastors, a synodical bishop or a member of the bishop's staff is encouraged to meet with a pastor at the time of retirement to discuss these guidelines, the pastor's new retired status, and its implications.

Adopted by the Church Council as policy of the Evangelical Lutheran Church in America, November 1998 [CC98.11.45].



SECTION 2

The Interim Pastor Arrives

I appeal to you therefore, brothers and sisters, by the mercies of God, to present your bodies as a living sacrifice, holy and acceptable to God, which is your spiritual worship. Do not be conformed to this world, but be transformed by the renewing of your minds, so that you may discern what is the will of God—what is good and acceptable and perfect. For by the grace given to me I say to everyone among you not to think of yourself more highly than you ought to think, but to think with sober judgement, each according to the measure of faith that God has assigned.

Romans 12:1-3

Appointment of the Interim Pastor

The bishop is officially the pastor of a congregation in transition between called pastors (per the constitution). Soon after a pastor resigns or retires, a representative of the Office of the Bishop meets with the congregation council to determine the pastoral needs during the transition time and what the appropriate next steps will be. The bishop then appoints an interim pastor with the consent of the council or congregation. The preferred option would be an Interim Pastor serving full-time or part-time. If that is not an option (due to availability or resources), there may be the appointment of an Interim Vice Pastor. The Interim Vice Pastor is a Pastor who serves as the pastoral guidance and support for a congregation's leadership, but they are not available for regular worship services. In that case, the congregation council works with the Interim Vice Pastor to find Pulpit Supply for worship services. The interim pastor serves as an extension of the Office of the Bishop. A **Letter of Appointment** with the expectations and compensation agreed upon is completed and signed by the interim pastor, the council and the Office of the Bishop. A copy of this letter is included in the resources at the end of this section.

Why an Interim Pastor and a Transition Process?

There are often those who will ask why it is that a congregation needs to have an interim pastor and a transition process to follow, as opposed to immediately forming a Call Committee and getting on with the business of finding a new pastor. Such questions often reflect the anxiety that is caused by the departure of a pastor and the unknown road ahead until a new pastor arrives. No one likes to be anxious, but anxiety is a natural part of transitions everywhere, in life and in the church.

1. Addressing such anxiety is one of the first reasons for having an interim pastor and a transition process that is intentional and measured in all its parts. The interim pastor, through ongoing preaching, teaching, pastoral care and interaction with the members of a congregation, can help restore a sense of stability for everyone so that all minds can be clear and free of anxiety when approaching a call process. The interim pastor is there to speak that good word from God for these moments of uncertainty and anxiety: "Do not be afraid. God is here, and God will lead us." (Gen.15:1; Isaiah 41:10).

Most people understand that making quick choices while being anxious will not always bring the best result. So the interim pastor and the intentional transition process of the Florida-Bahamas Synod helps to lower the anxiety and provide a place for the Holy Spirit to work in and among the people to guide their steps for a call process that can better result in a pastoral candidate of God's own choosing.

2. Intentional reflection time is another reason for an interim pastor and an intentional transition process. Congregations will often be defined significantly by the personalities and gifts of the pastor who serves them. And yet congregations have their own sense of call from God and have a history that is also filled with God and with ministries that God has inspired that go beyond any one pastor who has served that church, regardless how long.

At the same time, congregational members come and go during any pastor's service period. That means the gifts and talents in a congregation are always changing, which means that the possibilities for ministry and what God might be calling that congregation into is something that changes as well.

So an intentional transition process following a pastor's departure or retirement provides the opportunity for the congregation to reflect on questions such as these: "Who are we apart from the pastor who last served us? What is different in our congregation and in our context for ministry from when the last pastor arrived? What new blessings have come to us and what new talents and gifts are now a part of us that God might use for ministry? Where might God be calling us as a congregation now in this changed context? The interim pastor and the intentional transition process help congregations to take time to discern God presence, blessings and leading.

3. Some congregations experience deep loss, especially if they have been blessed with long stays by pastors serving them for many years, perhaps even decades. Such long-term ministries can provide stability within a congregation that can have comfortableness and familiarity to it that is most welcome and satisfying for congregational members. Even in shorter-term ministries, church members can develop strong attachments to their pastors and really come to depend on those pastors for personal and ministry assistance.

The departure of such pastors can therefore leave some church members with a real sense of loss. Learning to live with such loss can take time and can include typical grief patterns of anger, depression, denial, and bargaining before acceptance sets in for all and a congregation is ready to move forward with a renewed sense of dedication and purpose in God's mission.

The interim pastor and the intentional transition process is sensitive to the time that it might take for a congregation to grieve and process their loss prior to moving into a call process. The interim pastor keeps the Office of the Bishop informed as to the progress of a congregation as they work through grief, offering helpful tools and comforting care. Finally, the interim pastor will advise the Bishop and the congregational Council as to when the congregation seems ready to begin a call process.

4. First Impressions: The congregation's website will be the first look for potential candidates. It is also the first look for every visitor to your congregation (and this includes livestreaming!). A congregation should take the opportunity to prioritize the ministry's "digital front porch." Is it communicating your congregation well? Are there lots of pictures that are out of date or of former pastors?

Additionally, the congregation's campus will be the second look for pastoral candidates. It should not be forgotten that these pastors are coming to look over the church campus and the congregation that they are being invited to consider serving. Are all things ready for this at the church? Is the church's physical plant in good working order, tidy in each of its sections and rooms, and ready to be seen by someone new? Is the congregation itself in good working order, eager and active in their ministries, with positive attitudes, ample volunteers, and good support providing adequate resources for all that God calls the congregation to do? Or does some of this need some attention and work? Has there been something that the last pastor had to deal with that the next pastor should NOT have to deal with?

The interim pastor and the intentional transition process help a congregation to get ready for a call process by bringing tools that will allow members to evaluate their situation and to make improvements where

necessary. The interim pastor also brings a fresh set of eyes to see things like an outsider might see them. The interim pastor also brings a fresh perspective that may not have been considered before as the leaders and congregation review their situation together.

The goal is to have the best possible call process and the best possible outcome to that process – one that is filled with God and guided by the Holy Spirit. So intentional time and effort will be put into preparation for that process through forms that will help to evaluate the ministry situation and make sure that all things that need to be looked at have been assessed and addressed.

These are just some of the reasons that interim pastors are appointed to vacancies in congregations and an intentional transition process is employed in the Florida-Bahamas Synod. Even as the reasons above indicate, the process that is used is tailored to each congregation and the unique situation of their ministry. The Office of the Bishop works hand-in-glove with congregations, their leaders and interim pastors to evaluate each ministry setting, navigate the process through the needs of that setting, and pace the process for the sake of a good and Spirit-filled outcome that results in a new pastor for the congregation.

Arrival of the Interim Pastor

The congregation may use the *Order of Welcome for the Interim Pastor* in the resources at the end of this section to welcome the interim pastor in worship. The interim pastor has all the rights and duties of a regularly called pastor as noted in the constitution for congregations. The members of the congregation will look to the interim pastor to preside at all baptisms, celebrations of holy communion, weddings, funerals, and other rites of the church.

It is through the service of interim pastors that the bishop provides for the pastoral care of congregations that are without called pastors. The interim pastor makes regular reports to the bishop using the *Interim Pastor Report* form, included at the end of this section.

Sometimes due to the length of the transition time or the availability of interim pastors, more than one interim pastor will serve during the transition. Supply pastors are occasionally used to provide pastoral care in the time of transition. The interim pastor's letter of "Appointment to Interim Ministry" and progress with transition goals will be reviewed by the Office of the Bishop in consultation with the Interim Pastor and congregation council six months after the effective date.

Training and Role of Interim Pastors

Interim pastors in this synod receive special training to serve in this important role. In addition to the training provided by the synod, many interim pastors are further trained through the Interim Ministry Network, which teaches many specialized skills for pastors serving congregations in transition. Interim pastors are pastors in good standing within the Evangelical Lutheran Church in America or other approved church body and are often retired pastors.

While the interim pastor provides continuity for pastoral leadership and care, the role of an interim pastor is also different from that of a regularly called pastor. From the beginning of his/her service, it is known that the interim pastor's ministry is temporary (usually less than two years). During the transition time, the interim pastor assists the congregation in addressing special tasks that will help strengthen the congregation's ministry as it prepares for the new pastor.

During the transition period, a congregation can reflect, renew, grow and learn about itself. Rather than simply a time to put everything on hold or maintain the “status quo,” the transition time is an opportunity for the congregation and interim pastor to do many things in preparation for the start of a new pastor’s ministry. In assessing a congregation’s ministries, leadership will ask “what is working well? Why do we do what we do? Is everything we do in line with God’s vision for us? Do we have support for all that we do? Should we stop doing something? Should we start doing something?”

The interim pastor, along with congregational leaders, will assess attendance trends, finances and stewardship, congregational participation and attitudes, leadership and organizational need, personnel needs, spiritual needs and ministry needs, especially with an eye to seeing that everything is stable and functioning well so that when a new pastor arrives, that pastor can more ably assist the congregation in moving into their next significant phase of ministry.

This means that congregations may experience change as a part of the interim period. Certainly change has already begun with the departure of the previous called pastor. Further change that may occur during the interim will have a purpose, which is to set up the next ministry well.

Congregations are best prepared for such change when congregational leaders are open and communicative about any change that is coming and express support for the interim pastor who is working with them to prepare for the next ministry. (See also *Dynamics of Transition Section 1*)

Five Primary Areas of Focus for the Interim Ministry

Helping to organize and frame the work during the interim period are the Five Primary Areas of Focus of the transition period.

1. *Putting the congregation’s history into perspective*

What a congregation becomes in the future is related to what it was in the past. The time of pastoral change is a good time for a congregation to reflect on and learn from its history and past behavior patterns under the tenure of its former pastors. Sometimes there exist unresolved issues that inhibit preparing for and building a new future.

2. *Claiming a clear identity in God’s call and mission*

The transition time is an opportunity for renewal. The congregation seeks to discover its identity as it comes from God and apart from the former pastor’s personality and style. This is a time for the congregation to take a realistic look at the image it has of itself as well as the image that the community might have of the congregation.

One aspect of creating a clear identity is to gain understanding of the neighbors who are around us. The congregation council will want to download and study the demographics data for their ministry area that is available at MissionInsite see (<https://fbsynod.com/mission-insite/> for instructions on registering, logging into and navigating MissionInsite). This data should be studied prayerfully and compared with any mission or vision statements or previous strategic plans that may have been developed. This review should include prayerful discernment around the question: What is the mission, ministry and future to which God is beckoning this congregation? Or put another way, what is God’s will for this congregation now and for the foreseeable future? The congregation council will want to have these questions answered and any adjustments made to mission/vision statements or strategic plans prior to the formation of a call committee, so that this committee may represent these to potential ministry candidates.

3. ***Supporting congregational leadership shifts and changes***

As ministry emphases grow and assume new directions, shifts in leadership and decision-making patterns may need to be made. Shared leadership, with both old and new leaders involved, is encouraged. Openness in process, clear expectations, empowering of volunteers and good communication within the congregation is sought.

4. ***Strengthening relationships with the synod and churchwide expression***

The interim pastor is in a wonderful position to help strengthen the partnership between the congregation and the greater church. Congregational leaders and the interim pastor assist the congregation in dealing with past perceptions or experiences and in building new awareness of the mission of the greater church. The recent history of mission support and benevolence is also examined and strengthened.

5. ***Deepening commitments to new pastoral leadership and the future***

The congregation participates in many activities to build consensus and excitement about the vision for the future. As the vision for future ministry develops, clarity of leadership style, gifts and skills desired in the next called pastor develops. Preparations are made for the arrival of the new pastor and the conclusion of the interim ministry.

Assessing Special Needs for Interim Ministry

The congregation council works with the Office of the Bishop in determining special needs or issues that should be addressed during the transition period. These might include unresolved conflict, changing community contexts and demographics, a very long pastorate by the previous pastor, or a need to study and assess the viability, focus and nature of the congregation's future ministry.

To assist with this assessment, the interim pastor is asked to complete the ***Early Assessment of Interim Assignment*** tool in the first six weeks of arrival and submit it to the Office of the Bishop.

The Florida-Bahamas Synod has many resource materials and gifted resource people to assist congregations. Trained coaches and consultants with specialized skills are available to work with council leadership and the interim pastor to address special areas of concern to assist the congregation in its journey towards a healthy and vibrant ministry. Coaches receive an honorarium and IRS rate mileage reimbursement from the congregation.

Congregational Sustainability Assessment & Transition Process Checklist

The congregation council, with the guidance of the interim pastor, will gather information for the ***Congregational Sustainability Assessment*** form at the end of this section. This form will assist leaders and the interim pastor to assess the situation of the congregation as it looks toward the future regarding supporting the congregation's ministries and pastor. Although only a few persons may be assigned to gather the information for the form, the full congregation council with the interim pastor should discuss the results of the assessment.

The congregation council, with the guidance of the interim pastor, will work through the ***Transition Process Checklist***. This checklist covers several administrative, financial, and planning functions that

should be reviewed to “put our house in order” in anticipation of a new ministry. Sometimes this work can uncover vulnerability within a congregation, raising questions about a sustainable future. In these cases, the movement towards a call process is postponed, while the congregational leadership partners with the Office of the Bishop to determine the next steps forward (see Paths Forward in Section 1).

After completion of the *Congregational Sustainability Assessment* and the Transition Process Checklist, both should be submitted to the Assistant to the Bishop for Transition for review and future discussion.

Interim Pastors and the Call Process

The congregation council and the Office of the Bishop determine when the congregation is ready to establish a call committee and move forward into the call process. A representative of the Office of the Bishop, often the dean of the conference, will work closely with the call committee. While the interim pastor may assist with process questions, he/she is not to be involved with call committee meetings or the content of their work. The interim pastor is not to exert any influence on the congregation’s selection of a new pastor.

The interim pastor is not available for call to this congregation. Before appointing a pastor to serve as interim pastor, the bishop shares with that pastor that the interim will not normally be considered for call to this congregation. The congregation and the interim pastor are reminded of this fact when the *Letter of Appointment* is signed.

Saying Good-bye to the Interim Pastor

Most congregations establish strong bonds with the interim pastor during the transition period, and it can understandably be difficult to end this relationship when the new pastor has been called. For this reason, we encourage the congregation to provide a nice farewell for the Interim Pastor. *A Litany of Farewell for the Interim Pastor* is included with the resources at the end of this section. A reception after the worship services is also a nice way to say good-bye.



THE EVANGELICAL LUTHERAN CHURCH IN AMERICA
LETTER OF APPOINTMENT
TO
STATED SUPPLY INTERIM MINISTRY

Rev. Ronald McDonald

Name

IN THE NAME OF THE FATHER, AND OF THE SON, AND OF THE HOLY SPIRIT. AMEN.

Our ministry comes from Christ through the Church and belongs to the whole people of God. The gospel calls all Christians to be ministers in word and deed. So it is the privilege of every Christian to be a steward of the gospel of God's reconciling love. The whole church ministers as it celebrates God's presence, shares in the Good News, cares for those in need, and witnesses to the power of God's love.

The Evangelical Lutheran Church in America recognizes the office of pastor. It also recognizes that there are occasions when parishes will need to be served by interim pastors while the parish is in the study or calling process. Keeping in mind the apostolic advice that all things be done decently and in order (I Cor. 14:40), the church provides for the appointment of interim pastors.

Accordingly, the Bishop of the Florida-Bahamas Synod of the ELCA appoints you to serve as Interim Pastor of:

Congregation: St. Timothy's Lutheran Church City: Crystal River, FL

Effective date: March 3, 2025 – April 30, 2025 on the following conditions and mutual covenants.

We together, as Synod, Interim Pastor and Congregation, during this interim, agree to address together the following items:

You as Interim Pastor:

- Preach and teach the Word of God.
- Preside at worship and administer the sacraments according to the practice of the Lutheran Church, not seeking to change the congregation's worship practices during the interim without concurrence from the Office of the Bishop.
- Provide pastoral care to all members of the parish according to the needs, visit as necessary, and uphold the congregation in prayer. Arrange for pastoral care needs to be covered in your absence.
- Within the agreed upon days of service, give pastoral leadership for the meetings, activities and organization of the congregation.
- Encourage the congregation to support the total ministry of the Evangelical Lutheran Church in America, raising during your interim ministry the level of the congregation's commitment to mission support through the Synod.
- Be responsible for the recording of baptisms, confirmations, marriages, funerals, attendance at Holy

Communion, and the maintenance of the membership rosters; and report the statistics of the parish promptly and fully, as requested by the Evangelical Lutheran Church in America.

- Attend council meetings. Notify the assistant to the bishop if unavailable.

The congregation is called to:

- Receive the stated supply pastor, uphold them in prayer, and accord the interim pastor love, respect, and good will.
- Look to the interim pastor to preside at all baptisms, celebrations of Holy Communion, and the rites of the church (marriages, funerals, etc.).
- Compensate the interim pastor in the following ways:
 1. Salary of \$_____ to be paid: (circle one) weekly, bimonthly, or monthly.
 2. Provide living quarters with utilities paid, or a monthly allowance of \$N/A_____, if applicable.
 3. Provide mileage reimbursement at the standard IRS rate to cover driving related interim pastoral ministry.
 4. Provide a professional allowance of \$100.00 per month.
 5. Provide for ELCA pension and major medical coverage, if applicable as follows: N/A
 6. Provide one week of vacation with full salary and benefits for every 3 months of interim ministry.
 7. Reimburse expenses for travel and related expenses to attend Interim Pastors Colleague Group.
 8. Reimburse or pay directly for registration and expenses incurred in attending the annual Synod Assembly and the annual Conference on Ministry as the Interim Pastor.
 9. Reimburse or pay directly for registration expenses occurred in attending ongoing FB Ministry for Interim Pastor.

Please acknowledge in writing receipt and acceptance of the Letter of Appointment. As you consider this Appointment, may the Holy Spirit guide your response.

This appointment is made by and may be terminated by the Bishop. The Congregation, the Office of the Bishop or Interim Pastor may also terminate this agreement, after consultation with the Bishop. This appointment automatically terminates with the call of the new pastor, effective as of the date agreed on by the congregation and the Office of the Bishop.

Congregational contact person for any matters related to the Appointment: _____

Signed:

Rev Nicole Eastwood for the Office of the Bishop: _____ Date _____

Rev Ronald McDonald Interim Pastor: _____ Date _____

Ham Burglar for the Congregation: _____ Date _____

Please send a copy of this form, when signed, to:

**Assistant to the Bishop for
Transition and the Call Process
Office of the Bishop
Florida-Bahamas Synod
3838 W. Cypress Street
Tampa, FL 33607**

Resource B

Order of Welcome for the Interim Pastor

*At the first service in which an Interim Pastor leads worship,
the following may be used after the prelude and prior to the beginning of worship.*

President of the Congregation Council:

People of God, the Rev. _____ has been appointed by the Office of the Bishop of the Florida-Bahamas Synod to serve _____ Lutheran Church as our Interim Pastor. (A description of duties and days may be inserted here.) We welcome him/her into our midst as a shepherd and guide for our ministry and thank him/her for his/her willingness to be with us during our time of transition. Let us together ask God's blessings on Pastor _____ and upon the work that we will do together in Christ's name.

The President or an Assisting Minister may offer the following prayer:

A: Loving God, we thank you for sending this faithful pastor to be among us during this special time in the life of our church. And we ask that you would empower him/her with your Holy Spirit that his/her preaching and teaching may show forth your living presence, that his/her counsel might be blessed with wisdom and insight, and that all our work together may witness to the love of Jesus Christ, our Lord and Savior.

C: **Amen**

A: Pastor _____,

C: **We welcome you into our family and pray God's blessing be upon you.**

The Interim Pastor may wish to respond with a few informal remarks.

The service begins as is customary.

Intentional Blank Page

Resource C
Interim Pastor Report
Florida-Bahamas Synod, ELCA

Report for Month(s): _____, 20____ Date of Report: _____

Interim Pastor: _____ Email address: _____

Interim Pastor's Phone: _____ Cong/City _____

Please indicate areas where progress has been exhibited and expand below:

- Putting the congregation's history into perspective.*
- Claiming a clear identity in God's call and mission.*
- Supporting congregational leadership shifts and changes*
- Strengthening inter-relationship with the synod and churchwide*
- Deepening commitments to new pastoral leadership and the future*

What challenges has this congregation faced in the past month? What is the biggest threat?

What celebrations do you have since your last report? Where have you seen growth?

Additional concerns or updates for the Office of the Bishop:

Signed: _____

Please provide copies of this confidential report to the Bishop, to the Assistant to the Bishop for Transition and to the Conference Dean. Retain a copy for your files. Attach copy of council minutes if helpful. This report is not copied to council.

If the congregation has approved a new budget, please submit to the Assistant to the Bishop for Transition and Candidacy.

Resource D
Early Assessment of Interim Assignment

The Interim Pastor is asked to use the following form in evaluating a new interim assignment in the first six weeks and then submit it to the Office of the Bishop. Use this form to help identify areas to address during the interim.

Congregation information

Church Name and City

Interim Pastor

Date

1. Attendance trends:

What is the average worship attendance in the current year?

What was last year's worship attendance reported to the ELCA?

Has there been a change in worship attendance during the past 2 years?

Yes

No

If so, what do people attribute that to?

2. Financial/Stewardship Trends

Is the financial situation stable or unstable?

Stable

Unstable

Has there been a marked change in the financial situation?

Yes

No

If so, to what do people attribute this change?

Does this situation indicate a readiness to support a called pastor?

Yes

No

Is there an annual stewardship or pledge drive?

Yes

No

Are audits conducted annually?

Yes

No

When was the last audit by the audit committee?

What percentage of the congregation pledges annually?

3. Congregational Participation Trends

What are people saying about volunteer participation?

High

Med

Low

What are people saying about event participation?

High

Med

Low

Do people feel connected to ministries of the congregation?

Yes

No

Has there been a recent change in volunteer and event participation?

Yes

No

If so, to what do people attribute this change?

4. Leadership trends

What is the congregation's trust level in their elected leadership?

High

Med

Low

Do leaders feel adequate to their task?

Yes

No

Are there any signs of burnout?

Yes

No

Does the congregation have a history of leader/participant burnout?

Yes

No

How is the communication between leadership and the congregation?

High

Med

Low

Is the leadership using their constitution as a guide for their leadership?

Yes

No

Is there a long-range strategic plan?

Yes

No

If so, when was it last reviewed or revised?

5. Organization for Ministry

Is there a clear internal structure for the organization for ministry?

Yes

No

Is the structure working to effectively deliver ministry?

Yes

No

If not, what do people attribute this to?

Is there appropriate accountability/communication between leadership and ministries?

Yes

No

Are all ministry teams/committees functioning?

Yes

No

Are new people welcomed into existing structures of leadership?

Yes

No

Is there a clear Mission/Vision Statement

Yes

No

Are decisions made in the congregation through healthy and appropriate channels?

Yes

No

6. Attitude Trends

What are people saying about the attitudes in the congregation?

Has there been a shift in attitudes in the last two years?

Yes

No

Is there conflict present in the congregation?

Yes

No

If so, to what do the people attribute this?

Is the congregation welcoming of visitors?

Yes

No

Is there a system of visitor follow up?

Yes

No

Is the congregation hopeful and positive?

Yes

No

Is the congregation focused inward or outward?

Inward

Outward

What is the congregation's current anxiety/fear level?

High

Med

Low

What issues (if any) have been left unaddressed for a considerable time that need addressing?

7. Spiritual Trends

Does prayer permeate the entire organization?

Yes

No

Is there an active prayer group/chain?

Yes

No

Are people eager to grow spiritually?

Yes

No

Is there an ongoing Christian Education of youth?

Yes

No

Is there an ongoing Bible Study for adults?

Yes

No

8. Conclusions

Is the situation as you expected to find it as described by the Office of the Bishop?

Yes

No

What is the primary gift of this congregation?

What stands out as troublesome/challenging for this congregation?

List any other areas that need addressing that are not mentioned above

My name and date entered here constitutes my electronic signature to this report and attests that all information is true and accurate to the best of my knowledge.

Transmittal Instructions:

E-Mail copies of this report to the Assistant to the Bishop for Transitions and Candidacy,
Rev. Nicole Eastwood at nicolee@fbsynod.org,

Or mail a hard copy to:
The Office of the Bishop
FL-Bahamas Synod, ELCA
3838 W Cypress St., Tampa 33607

Intentional Blank Page

Resource E
Congregational Sustainability Assessment

The following form should be filled out by the elected congregational leadership and the results discussed by the congregational council when completed.

SUSTAINABILITY: FACILITIES

I. BUILDING AGE & MAINTENANCE

1. In what year(s) were your parish buildings constructed?

Sanctuary _____ Parish Hall _____

Other buildings & dates: _____

2. HVAC & other major systems are new or have been replaced within the last 10 yrs. Y N

3. If our sanctuary A/C (or other major system) failed next week, we would have the funds on hand to replace it? Y N

4. Such an expense would pose a financial crisis for our congregation. Y N

5. Think back to the last major maintenance need (new roof, new windows, new a/c etc.):

a. What was the repair needed? _____

b. How were the needed funds secured? _____

c. How did the congregation respond? _____

d. Is it realistic to expect the same response/resolution when the next major maintenance need arises?
Y N

6. Based on our answers above, do we see our Building Age & Maintenance as a strength or a weakness for our sustainability as a congregation? **Strength** **Weakness**

II. CURRENT BUILDING USAGE

7. Time wise, our building is utilized for ministry gatherings and outside community activities approximately how many hours each week (outside of Sunday morning)?
- 0-5 hours 5-20 hours 21-40 hours 40-60 hours
8. Overall, our facilities (sanctuary & parish hall) are:
- Under-utilized
 Just right for our needs
 Too small for our needs
9. Do you currently receive donations from sharing your facility with other organizations? Y N
- a. If so, what percentage of total income does this rent represent annually? _____ %
10. Based on our answers above, do we see our Current Building Usage as an opportunity or a threat for our sustainability as a congregation? **Opportunity** **Threat**

SUSTAINABILITY: FINANCES

III. FINANCIAL STEWARDSHIP

11. Our current stewardship efforts consists of: (check all that apply)
- Adopting a budget at the annual meeting.
 Printing the offering amount in the bulletin each Sunday.
 Including a bulletin appeal when funds are running short.
 Monthly stewardship temple talks by a lay leader that focuses on practices of generosity as part of growing in faith.
 Annual Financial Stewardship campaign.
 We actively encourage and lift up the Biblical practice of tithing.
12. Half (or more) of our annual congregational giving comes from the 65+ age group? Y N
13. If our congregation's top one or two giving households died within the next year, there would be a financial crisis within our congregation? Y N
14. We know the giving capacity of our congregation, based on the median household income in the area? Y N
(That info can be found at www.census.gov/quickfacts/ Enter zip code and choose "Income & Poverty" in the Select-a-Fact box. Also available at MissionInsite.com)
15. We have a congregational/ endowment/memorial fund. Y N
- a. If yes, we have withdrawn \$ _____ from it to pay regular ministry expenses within the past 12 months.
16. We receive financial gifts by: (check all that apply)
- Through passing around offering plates/baskets in worship
 Providing and promoting online giving, giving at kiosks, etc.
 Providing and promoting gifts through estate planning, trusts, stock gifts, etc.

17. How much mission support do we provide to/through our Synod and the ELCA for new ministries and churches and pastoral training?
- We don't provide any mission support to the Synod or ELCA
 - Less than 5% of our annual budget
 - 5-10% of our budget
 - More than 10% of our budget
18. Based on our answers above, do we see our Financial Stewardship as an Opportunity or a Threat for our sustainability as a congregation?
- Opportunity** (*we have the capacity to increase our giving*)
 - Threat** (*we are maxed out on our giving capacity and could be in jeopardy*)

IV. PASTORAL COMPENSATION

19. We are able to provide a full-time “Defined Compensation” (*does not include medical or pension*) to our pastor that is equal to or greater than synod guidelines. (*See “Compensation Guidelines Worksheet” at FBSynod.com/rosteredministers*) Y N
- a. If not, what is the level of “Defined Compensation” we are able to provide our pastor based on our recent actual giving numbers? \$ _____
20. We are currently able to provide full benefits coverage (*full family health, disability, retiree support*), and at least 10% pension to our pastor, based on the “Defined Compensation.” (*See the Portico Benefits Calculator tool at <https://employerlink.porticobenefits.org/resources/calculators/benefit-costs-calculator#/>*) Y N
- a. If not, what level of benefit coverage are we able to provide our pastor? \$ _____
21. We are able to provide continuing education, professional expenses and mileage reimbursement to our pastor. Y N
22. Based on our answers above, do we see our ability to support Pastoral Compensation as a strength or a weakness for our sustainability as a congregation? **Strength** **Weakness**

SUSTAINABILITY: PEOPLE

V. LEADERSHIP

23. We regularly have enough people to serve on Council. Y N
24. We regularly have enough people to serve on committees. Y N
25. We regularly have enough people to lead the most important ministries we do. Y N
26. Based on our answers above, do we see our Leadership as a strength or a weakness for our sustainability as a congregation? **Strength** **Weakness**

VI. WORSHIP

27. We have enough people to help with weekly worship preparations and assistance. Y N
28. What has our average worship attendance been for the last 5 years? (See your Annual Reports or the “Full Trend Report” for your congregation at <http://www.elca.org/tools/findacongregation>)
- 1 yr ago _____ 2 yrs ago _____ 3 yrs ago _____ 4 yrs ago _____ 5 yrs ago _____
29. Based on these numbers, our congregation is Growing Holding Steady Declining
30. Based on our answers above, do we see our Worship as a strength or a weakness for our sustainability as a congregation? **Strength** **Weakness**

CALCULATING OUR SUSTAINABILITY

Enter below how we identified the following for our sustainability as a congregation in the sections above.

FACILITIES

- I. Building age and maintenance **Strength** **Weakness**
 II. Current building usage **Opportunity** **Threat**

FINANCES

- III. Financial Stewardship **Opportunity** **Threat**
 IV. Pastoral Compensation **Strength** **Weakness**

PEOPLE

- V. Leadership **Strength** **Weakness**
 VI. Worship **Strength** **Weakness**

Congregations need resources to sustain ministry. The three primary resources include facilities, financial and people. Reflect on what you filled out above. Then use the following questions to estimate your sustainability.

	Declined to not sustainable	Declining but still sustainable	Maintaining	Growing or Increasing	Copy number
<i>Do you have what you need to maintain or expand ministry in these areas:</i>	1	2	3	4	
Facilities Capacity – maintainability and usage of facilities					
Financial Resources – to pay for facility, staffing, ministries, etc.					
People Power – to provide leadership, strengthen and sustain one another					
Write the lowest number here:					

Since people, financial resources and facilities are necessary for sustainability, the lower number represents the “weakest link” in your congregation’s sustainability chain.

*After reviewing this assessment with the congregational council, return this form along with the completed **Transition Process Checklist** to the Assistant to the Bishop for Leadership.*

Intentional Blank Page



Florida-Bahamas Synod
Evangelical Lutheran Church in America
God's work. Our hands.
3838 West Cypress Street ♦ Tampa, Florida 33607
813.876.7660 ♦ fbsynod.com ♦ info@fbsynod.org

Transition Process Checklist

For Congregations

Leadership Information

Congregation: _____

City: _____

Interim Pastor: _____

Start Date: _____ Phone: _____ Email: _____

Dean: _____

Phone: _____ Email: _____

Worship: Average annual worship attendance: _____

High Season: _____ Low Season: _____

Worship service time(s) and styles(s):

TRANSITION PROCESS CHECKLIST (Seek to complete <i>before</i> forming a call committee)		
Suggested documents are available at www.fbsynod.com/resources.		
Administrative		Checkbox
Date Completed ____/____/____	1. Reviewed “ <i>Walking Together through the Transition Process</i> ” Transition Manual (fbsynod.com/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	2. Council orientation “ <i>Administrative Handbook for Councils</i> ” (fbsynod.com/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	3. Membership roster updated	<input type="checkbox"/>
Date Completed ____/____/____	4. Electronic Parish Register data backed up and a regular back up process in place.	<input type="checkbox"/>
Date Completed ____/____/____	5. “ <i>Policy on Sexual Ethics Related to Sexual Misconduct in Ministry</i> ” reviewed with leadership. (Section 11: Additional Resources)	<input type="checkbox"/>
Date Completed ____/____/____	6. “ <i>Definitions and Guidelines for Discipline</i> ” reviewed with leadership. (fbsynod.com/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	7. Annual congregational (Parochial) report filed with the ELCA. Who, in addition to pastor, is responsible for submitting form?	<input type="checkbox"/>
Date Completed ____/____/____	8. Congregation’s constitution is updated with most recent ELCA amendments to the Model Constitution and is submitted to Assistant to the Bishop for Administration for review and approval by Synod Council. (See elca.org/About/Churchwide/Office-of-the-Secretary/Constitutions for the latest amendments)	<input type="checkbox"/>
Date Completed ____/____/____	9. Website reviewed, updated, and maintained	<input type="checkbox"/>
Date Completed ____/____/____	10. Membership/visitor email database current.	<input type="checkbox"/>
Date Completed ____/____/____	11. Building: Risk management/safety/repairs/insurance review	<input type="checkbox"/>
Date Completed ____/____/____	12. Reviewed “ <i>Enrich and Transform: Welcoming LGBTQ Candidates into the Call Process</i> ” (fbsynod.com/resources/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	13. Reviewed “ <i>A Safe Place for All God’s Children</i> ” (Section 11: Additional Resources)	<input type="checkbox"/>
Date Completed ____/____/____	14. “ <i>Keeping the Church a Safe and Sacred Place for All, Responding to Sexual Misconduct</i> ” brochure reviewed and displayed. (Section 11: Additional Resources)	<input type="checkbox"/>

Date Completed ____/____/____	15. Disaster Response Plan for the facility. https://fbsynod.com/mission-ministry/disaster-response/	<input type="checkbox"/>
Date Completed ____/____/____	16. Disaster Response Plan for congregation. https://fbsynod.com/mission-ministry/disaster-response/	<input type="checkbox"/>
Date Completed ____/____/____	17. Mission Insite demographic data downloaded by congregation council for use in call process (see https://fbsynod.com/mission-insite/ for instructions on registering, logging into and navigating Mission Insite)	<input type="checkbox"/>
Date Completed ____/____/____	18. Mission Insite studied and discussed by congregation council regarding mission and ministry planning prior to call process.	<input type="checkbox"/>
Financial		
Date Completed ____/____/____	1. Mission Support Date reviewed: ____/____/____ Contribution interval: _____ Percentage of budget: _____%	<input type="checkbox"/>
Date Completed ____/____/____	2. Mission Support Covenant Form submitted to Synod Office (Due Jan. 31)	<input type="checkbox"/>
Date Completed ____/____/____	3. Who, in addition to pastor, is responsible for submitting the Mission Support Covenant Form?	<input type="checkbox"/>
Date Completed ____/____/____	4. Compensation Guidelines reviewed with the council. (fbsynod.com/resources/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	5. Stewardship program reviewed and conducted/ongoing.	<input type="checkbox"/>
Date Completed ____/____/____	6. Books audited/budget reviewed.	<input type="checkbox"/>
Date Completed ____/____/____	7. Send in congregational financial reports to the Assistant to the Bishop for Administration, and the Assistant to the Bishop for Transitions and Candidacy. Financials will be reviewed to ensure congregation's ability to fund a pastoral compensation package according to Compensation Guidelines and address provision for future sabbatical.	<input type="checkbox"/>
Date Completed ____/____/____	8. Endowment plan reviewed or explored.	<input type="checkbox"/>
Date Completed ____/____/____	9. Mission Investment Fund Investments or other investments have been thoroughly reviewed or explored.	<input type="checkbox"/>
Date Completed ____/____/____	10. Conducted a Ministry Focusing Retreat with the congregation utilizing _____ as Leader/Facilitator	<input type="checkbox"/>

	Key Ministry Planning Areas The items below are listed for discussion and ongoing action. Materials and resources noted are useful examples among many.	
Date Completed ____/____/____	1. Connect with your Director for Evangelical Mission to discern your Congregational Vitality	<input type="checkbox"/>
Date Completed ____/____/____	2. Review the Alban Institute book: “ <i>Discerning Your Congregation’s Future</i> ” by Ray Oswald. Study chapters as needed. (Synod Resource Center)	<input type="checkbox"/>
Date Completed ____/____/____	3. Regular leadership orientation/training: “ <i>Administrative Handbook for Congregation Councils</i> ” (fbsynod.com/resources/transitions)	<input type="checkbox"/>
Date Completed ____/____/____	4. Regular and continuing evaluation of the vision among the leadership/congregation.	<input type="checkbox"/>
Yes { } No { }	5. This congregation has developed a strategic plan for the coming years.	<input type="checkbox"/>

Return this form and the Congregational Sustainability Assessment (Section 2, Resource D1) to the Assistant to the Bishop for Leadership:

1. By Email with attachments, or
2. By regular mail to:

**Florida-Bahamas Synod, ELCA
Assistant to the Bishop for Transitions and Candidacy
3838 W. Cypress Street
Tampa, FL 33607-4803**