

PASTORAL TRANSITIONS

GUIDELINES

ALABAMA-WEST FLORIDA CONFERENCE

THE UNITED METHODIST CHURCH

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GENERAL GUIDELINES

1. Please take the time to read through this booklet carefully.
2. Please become aware of what **you** are responsible to fulfill.
3. Please become familiar with what is expected from others in this transitional process.
4. Laity are encouraged to remember that this is an extremely busy and stressful time for pastors/families who are moving. It is important to be supportive of pastors/families.
5. Pastors are encouraged to be good to themselves/families/laity!
6. Please do not allow these guidelines to be overwhelming!
7. Please call your district superintendent if he/she can be helpful in any way at any time.

APPOINTMENT PROCESS

PASTORAL CHANGES

1. Pastoral changes are likely to occur when...
 - a. A church, through the Pastor-Parish Relations Committee [PPRC], requests a change.
 - b. The pastor requests a change.
 - c. The cabinet believes a change would be helpful for the church, the pastor, or both.
 - d. There is a change in the pastor's Conference relationship.
 - e. A pastor is needed for a missional purpose in another setting.

Note:

Just because a PPRC or a pastor requests a change doesn't mean that a pastoral change will be made. In most instances, however, when a PPRC requests a change, one is made. If the superintendent believes that a change has been requested by a PPRC and the request isn't representative of the church, or that the church has requested a change rather than work through a consistent problem, the cabinet may not make a change.

The same is true about a pastor requesting a move. A request to move doesn't necessarily mean one will be made.

2. The *Discipline*, in ¶428.1 says, "A change in appointment may be initiated by a pastor, a committee on pastor-parish relations, a district superintendent, or a bishop."
3. United Methodism has an open itineracy. "Open itineracy means appointments are made without regard to race, ethnic origin, gender, color, disability, marital status, or age, except for the provisions of mandatory retirement...Through appointment-making, the connectional nature of the United Methodist system is made visible." (*The 2016 Book of Discipline*, ¶425.1)

WHEN A PASTORAL CHANGE IS DESIRED BY A CHURCH

1. The district superintendent will work through the PPRC when a church requests a pastoral change.
2. Early in the calendar year, the PPRC chairperson will receive a letter from the district superintendent, asking that the committee meet to consider pastoral needs for the coming year. If there is concern/questions about assuring the continuation of the current pastor or desire to discuss implications of a possible change, the chairperson will contact the district superintendent and request a meeting for purposes of consultation. In the initial meeting in response to the district superintendent's letter, it is important for the pastor to be present for the full discussion.

The PPRC should be certain that a pastoral change is desired for the good of the church and/or pastor. **[Do not vote as a congregation or board/council on whether a change should be made. Voting invites division within the congregation.]**

3. **Consultation is a continuing process.** Throughout the year, the district superintendent and/or bishop observe a pastor's work and a church's ministry. Letters and other information from a pastor and PPRC, and conversations with a pastor and members of the PPRC are part of consultation.

As stated in ¶258.2 (11) of *The 2016 Book of Discipline* and again in ¶426, the role of the PPRC is advisory. The above mentioned forms are also consultation.

The PPRC gives the superintendent a profile of the "type" of pastor they believe their church needs. The committee is **not** to give a name(s) of a person their church desires to the superintendent. Their desire may not be possible and, should a pastoral change be made, it's likely the new pastor will know that he/she isn't really the pastor the church desired. In the past, when such has been done, it has had a negative effect most of the time.

It's also unwise for members of the PPRC to visit churches to hear pastors they may be interested in having at their church. More frequently than not, such visiting becomes known and pastors and congregations become upset, and often hurt. **United Methodism has an appointive system, not a called system.**

4. **Often, a PPRC and congregation believe a pastor of a certain age will be the answer to their needs. From experience, the cabinet has found this to be a myth. Age is not what's important; what's important is effectiveness!**
5. If, in the judgment of the cabinet, a pastoral change should occur, the district superintendent will meet with the PPRC to give information about the pastor the cabinet desires to appoint to the church.
6. **Occasionally, in the appointive process, a pastor is asked to move when he/she and the church/charge have requested that no move occur.** The cabinet asks him/her to move because of the needs it has at that time to make the appointive process work. A church and/or pastor may feel cheated at that time, but it's a necessary move. No pastor's appointment is made casually by the cabinet.
7. **An important comment:** When the bishop and district superintendent begin making appointments, they do so prayerfully. In the beginning, they don't know what appointments will be made. Factors unknown at the beginning of the multi-week process will become known as the process unfolds. These factors are considered seriously. When the appointive-work is completed, it's startling to the bishop and superintendents to look at all that has happened. God has surely been present! God has guided the process.

Guiding Principles for New Pastors

Here are some guiding affirmations for you as you begin your new pastorate. They may be presumptuous thoughts. They are not intended to distort the grander principles of ministry. If they appear to be terribly simplistic, it is because they are!

1. **Keep the faith.** (If you lose that nothing else matters.)

2. **Never lose your nerve.** (If you do, others will too.)

3. **Earn respect through competence and integrity.**
(Love from others may/may not follow.)

4. **Provide vision.** (People perish without it.)

5. **Take charge.** (Provide leadership---which involves knowing the current situation, loving the people where they are, discerning the vision for the future...and building the people's trust in you.)

6. **Love and serve God (not the denomination) with your whole heart!** (Otherwise you'll become disillusioned.)

8. **And Remember:** If you pray honestly and work faithfully, there are two magnificent impossibilities:
 - a. to totally fail!
 - b. to perfectly succeed!So relax in God!

*And how you do this matters incredibly. Think shepherd/flock!

SECTION I

ENDINGS

ROLE OF THE CHURCH ON SAYING GOODBYE

Saying goodbye in appropriate ways is essential for healthy closure. These guidelines are merely suggestive. You are encouraged to be sensitive, creative and generous in saying goodbye.

1. **Chair of Staff/Pastor-Parish Relations Committee:**
The chair of the Staff/Pastor-Parish Relations Committee is the primary lay person responsible for insuring a healthy farewell for the pastor/family.
2. **Lay Leader and other officers:**
The chair will consult with his/her committee and work with the lay leader, trustees, parsonage committee and others to plan for a smooth transition.
3. **Ways to be supportive:**
The chair of the S/PPR Committee is encouraged to stay in close contact with the pastor, finding ways to be supportive. The pastor is the one who will feel the most stress and pressure in the move. It is well to remember that:
 - a) Every pastor/family touches certain individuals in very special ways. There are always those who grieve when "their" pastor moves.
 - b) Pastors/families also grieve knowing they are leaving loved ones behind.
 - c) The Staff/Pastor-Parish relations Committee is responsible to make sure the congregation and pastor are given an opportunity to say goodbye in a meaningful, concrete way. **This event should not be the night before a pastor moves.** He/she needs packing and cleaning time. **Consult with the pastor to schedule the time.** In some churches, the United Methodist Women or some other group sponsors this farewell event. The committee should make sure some group takes responsibility for an event.
 - d) The S/PPR Committee is the group to think through and communicate with other church leaders ways in which to express appreciation for the pastor/family. **If there are children in the pastor's family, you may want to consider ways in which they can be affirmed. Being the "preacher's kid" is not always easy!**
 - e) Be conscious of some members feeling betrayed or hurt by the pastor's moving. At times people pull away from the pastor to avoid dealing with the pain of separation.
 - f) Pray for wisdom to model for the congregation ways of facing grief/anger and dealing with these emotions in a healthy way.
 - g) And be sure to celebrate some of the high moments of the congregation's life together with the pastor. Hopefully, there will be times for joyful remembrances and laughter as well as tears!

4. **Informing the congregation:**
Use your best judgment in deciding how to inform the congregation your pastor is moving. Talk this through with your pastor--every church has unique issues to consider. As a general rule, it is appropriate to inform the PPR Committee first and then other groups in the church. The bishop counsels congregations not to announce too early **where** the pastor is going or **who** will be coming because changes are sometimes made before Annual Conference and a premature announcement can create awkwardness. Also, at times the church to which your pastor is going has not been formally informed of who their new pastor will be. It is appropriate to provide information in the newsletter that your pastor is moving and to interpret the appointive process.

5. **Lame duck:**
Please remember that your present pastor is still your pastor through the moving date. Do your part in avoiding the problem of the weeks before moving day becoming "lame duck" days.

6. **Parsonage Review:**
It is often painful for the parsonage family to have people in the church going through the parsonage at different times. **The chair of the S/PPR committee should plan to go through the parsonage as soon as possible with the chair of the trustees and chair of the parsonage committee to determine what repairs need to be done or what furnishings need replacement.** You are encouraged to do this with sensitivity but also with honesty. If repairs are needed, work out a schedule for same with pastor. Try to avoid having members going in and out of the parsonage as volunteer repair persons. This requires enormous sensitivity: you do not wish to add to the stress of the moving pastor/family, nor do you wish to have a parsonage incomplete for the new pastor/family (see p. 34 of this guide).

7. **Finances:**
The chair of the S/PPR Committee needs to work with the pastor and finance people to make **SURE ALL APPORTIONMENTS, PENSIONS, INSURANCE AND SALARIES ARE PAID IN UP TO DATE OR IN FULL THROUGH JUNE 30. THAT MEANS THAT 50% OF ALL APPORTIONMENTS, PENSIONS AND INSURANCE ARE TO BE PAID BY JUNE 30.** This is **essential.** Failure to do so reflects very negatively on pastor and congregation. Your present pastor is to be paid in full for the month of June.

8. **Goodbye means Goodbye!**
Remember that saying goodbye includes an understanding that when the pastor leaves, he/she does not return for pastoral or priestly functions. You will have a new pastor for those ministries.

9. **Parsonage check:**
After the pastor/family has its possessions loaded in the moving van/truck, it is the responsibility of the S/PPR chair to be present (or name someone in his/her place) with at least two other members of the committee or a trustee and parsonage committee chair to go through the parsonage to make sure the house is clean and each one is satisfied with the inventory of furnishings. If there are problems that cannot be mutually resolved, Conference policy requires that the district superintendent be called immediately (see p. 35 of this guide).

Celebrate the joys, forgive the mistakes and bid farewell with grace!

ROLE OF THE PASTOR ON SAYING GOODBYE

The way in which you say goodbye is crucial to both how you begin your new pastorate/retirement and create the environment for your successor. Healthy closure is important for you, your family and congregation. Hopefully, you will experience some grief as you prepare to leave. Sometimes there is also relief (and you do not need to feel guilty about that.) And it is natural to experience excitement as you anticipate your new appointment/retirement. Regardless, these weeks before moving will be hectic, full and stressful. You are encouraged to be kind to yourself -- to pace yourself so that you can begin your new pastorate (or even retirement) with freshness and energy.

You already know what leaving your pastorate involves. These suggestions are merely reminders. (That's what we do for our congregations every Sunday morning -- invite them to remember what they already know!)

1. **Consult with the S/PPR Chair:**
Consult fully and frequently with the chair of your S/PPR committee regarding all the concerns pertaining to your leaving. It is also well to include at least the lay leader in the "loop of information."
2. **Call your successor:**
You are encouraged to call your successor and welcome her/him. You are free to arrange for the new parsonage family to visit you and see the parsonage.
3. **Share feelings:**
Honestly convey to the chair of your current PPR committee ways that the congregation can be helpful in the transition. Some pastors/families want help with packing their things while other pastors/families prefer as much privacy as possible. Share these and other feelings relative to the move with the PPR Committee.
4. **Seek closure:**
Some pastors will find it helpful to make a list of persons with whom they need to seek closure. A practical way to do this is to list those you want to visit with or eat with or telephone or to whom you want to write a note.
5. **Be sensitive:**
Take the time to reflect on and seek to understand how various ones in the congregation feel about your leaving. Listen with your "inner ear". Some members may tend to be passively aggressive, and it is really a reflection of their grief, fear of loss or sense of betrayal that you now leaving them. This is a time that calls for your finest pastoral graces!
6. **Celebrate!**
Seek to find ways to celebrate the good pieces of your tenure and ministry.
7. **Interpret your leaving:**
Find ways (through a pastoral letter?) to interpret to the congregation the appointive process. Invite the congregation to rejoice with you in your new opportunity for growth. **Please be honest with the congregation and tell them you are gladly moving to your new appointment/retirement.** No one on any district is being forced to move or is being "yanked" out of his/her present appointment. It is a sign of maturity and honesty to inform your church that this move is what you want even though it may be painful to leave. Failure to do this creates a hostile climate for your successor.

- 8. Informing the S/PPR Committee/Congregation:**
Please use your best instincts on *how* to inform the congregation that you are leaving. Please invite the chair of the S/PPR Committee to inform the congregation as to who will follow you. The formal announcement might well be delayed as long as possible since there will be changes in the appointments and because the congregation your successor comes from may not have been told where he/she is going. The bishop advises real caution at this point. Use your very best discretion.
- 9. Support for your successor:**
Do all that you can to show support for your successor. Tell the congregation that you will cease to be their pastor on the moving date. Do not be seduced into believing that the church will fall apart when you leave or that your relationship is so important to former members that you must respond by returning for weddings, funerals or counseling sessions. On moving date, just lay down the pastoral mantle of your present congregation. **Relinquish your keys and your control! Rest your ministry for your present church with God.**
- 10. Responsibilities relating to the parsonage:**
If there are any concerns that cannot be resolved on the condition in which the parsonage is left or about parsonage furnishings, you may call your district superintendent. At least one month prior to moving day, you are asked to invite the chair of the PPR committee, chair of the parsonage committee and/or chair of the trustees to do a walk-through in the parsonage **as soon as possible** to ascertain what needs to be done in preparation for your leaving and the incoming pastor/family's arrival. This can be a painful and difficult exercise but hopefully, it will require just one visit. Please refer to the Conference Guidelines concerning parsonages and pages 34-35 of this guide.
- 11. Be creative:**
Discuss with your S/PPR Committee some of the ways they can prepare for a new pastor -- encourage them to be sensitive and creative. Remind them of the importance of honoring the need for privacy for the new pastor/family.
- 12. No lame duck!**
You are the pastor of your present church through the moving date and are responsible for what happens on your "watch".
- 13. Pray!**
Above all, pray for patience, sensitivity, understanding and love in working through the transition. God still has a stake in your ministry!
- 14. Anticipate:**
Look to the future with joy and anticipation!

ON SAYING GOODBYE - CHECKLIST FOR PASTORS

This list suggests things to consider as you move. You may have your own checklist that is more useful than this. But please go through this list to be sure all the important items are included on your list. A copy of this check list is added as an insert to be used as a working copy.

A. INITIAL PREPARATIONS	Who Is Responsible
___ 1. Contact successor to welcome and invite to visit parsonage (see Role of Pastor Guidelines.) _____	
___ 2. Discuss various aspects of moving with PPR chair. _____	
___ 3. Make arrangements with mover of your choice. (See moving guidelines sheet.) _____	
___ 4. If you do not hear from chair of PPR committee and pastor of church to which you are moving, call your district superintendent. _____	
___ 5. Arrange visit to parsonage with PPR chair, parsonage committee chair and trustee chair to parsonage. _____	
___ 6. Check with treasurer on paying your full June salary. _____	
___ 7. Check with treasurer to see that at least 50% of all apportionments are paid by June 30. This is ESSENTIAL! Contact district superintendent if there is any shortfall. _____	
___ 8. Check with treasurer to see that all pension/health insurance payments are made through June 30. _____	
___ 9. Check with treasurer to see that a certified check (or whatever form of payment is required) is ready for movers of your successor. _____	
___ 10. Give precise information to successor when you will be out of the parsonage and when he/she may move in. _____	
___ 11. Send copies of orders of worship, newsletter, pictorial directory, brochures, etc. of your church to your successor as soon as possible. _____	
___ 12. Put in writing for your successor all calendar/meetings/weddings/expectations. _____	

		<u>Who Is Responsible</u>
___ 13.	Please request from successor information for Order of Worship for the first Sunday and be definite about who prepares that bulletin and when . If church secretary, give name of secretary and encourage contact. Provide helpful information such as name/phone number of organist, head usher, etc. Discuss with successor with whom he/she should touch base concerning first Sunday. _____	
___ 14.	Send floor plan/list of parsonage furnishings to successor. _____	
___ 15.	Get change of address cards from post office and notify publishers and others of new address. _____	
___ 16.	Prepare to have someone to greet new pastor/family on moving day and have check for movers and food/flowers, etc. as expressions of welcome. _____	
___ 17.	Leave your new address and phone numbers with PPR chair, church secretary, etc. _____	
___ 18.	See that parsonage lawn is cut and yard is attractive. _____	
___ 19.	Utilities (NOTHING IS TO BE TURNED OFF -- DO WHATEVER IS NECESSARY TO INSURE ALL UTILITIES ARE ON FOR NEW PASTOR.) a. <u>Phone</u> (Retain current number for new pastor. Ask that service be "suppressed". Inform new pastor if he/she is to contact phone company, too.) _____ b. Electricity _____ c. Water _____ d. Gas _____ e. Trash pick up _____ f. Other _____	
	Note: Give utility companies the date you will move out and have them bill you as of that date. (Give them your new address.) Advise companies of the name of your successor and date of move. _____	
B. CHURCH ADMINISTRATION		
___ 20.	List of homebound persons with addresses/phone numbers. _____	
___ 21.	List of those currently in hospital and those needing close pastoral care. Explain. _____	

		<u>Who Is Responsible</u>
___ 22.	List of those who have died in past year: date/name/address/ phone numbers of remaining families. _____	
___ 23.	List of nearby churches with pastors' names/phone numbers _____	
___ 24.	List of staff with names/home phone numbers/hours/job descriptions/salary/benefits. _____	
___ 25.	List of members of PPR Committee with phone numbers. _____	
___ 26.	List of names/phone numbers for lay leader and treasurer, chair of trustees, administrative board, council on ministries, worship committee, Sunday school superintendent. _____	
___ 27.	Directory or lists of administrative board, administrative council, trustees, Sunday school teachers, youth counselors and all committees, commissions, etc. _____	
___ 28.	Current membership list. _____	
___ 29.	Up-to-date listing of prospective members (Provide informa- tion on follow-up procedures for first-time visitors.) _____	
___ 30.	List of college students and where. _____	
___ 31.	Up-to-date records on baptisms, membership, marriages, etc. _____	
___ 32.	Church calendar with all projected dates. _____	
___ 33.	Information on welcome plans, receptions, etc. Who are contact persons? _____	
___ 34.	Provide information on traditions observed that are unique/ special to your congregation. _____	
___ 35.	When and how is Holy Communion celebrated? _____	
___ 36.	Information on ecumenical services your church share in. _____	
___ 37.	Information on Charge Conference records, filing system, sources for information, Order of Worship file. _____	
___ 38.	A history of the church. _____	
___ 39.	Copies of newsletters for past year. _____	
___ 40.	Map of the area. _____	

Who Is Responsible

___ 41.	Hymnal with dates on the hymn pages of when sung in last year. _____	
___ 42.	Who prepares Order of Worship, newsletter; information on deadlines; who prints same, etc. _____	
___ 43.	Fellowship events celebrated weekly/monthly/yearly. _____	
___ 44.	Office holidays, staff traditions. _____	
___ 45.	Important reports that will be immediately helpful such as Long Range Planning, Building Committee reports. _____	
___ 46.	Copy of financial reports for past <u>12</u> months. _____	
___ 47.	Copy of current budget. _____	
___ 48.	Copy of current goals. _____	
___ 49.	AND: right on top of your books and files for your successor, put a copy of the <u>Mission Statement</u> for your current church. _____	
 C. CHURCH BUILDING/GROUNDS		
___ 50.	Information on who opens/closes building on Sunday/other days. _____	
___ 51.	List of instructions regarding lights, fuse box, alarm systems, cooling/heating systems/contact persons/companies if problems. _____	
___ 52.	Information on groups using church and fees/policies/schedules on same. _____	
___ 53.	Information on who maintains the grounds -- responsible for snow removal, etc. _____	
___ 54.	Who cleans the building and their working schedule. (This could be provided with staff information.) _____	
___ 55.	Pastor's study/office cleaned and proper office furniture in place for successor. _____	
___ 56.	Pertinent information on special restrictions, etc., on certain spaces/rooms/equipment. _____	

D. PARSONAGE/PARSONAGE FAMILY

___ 57.	List of nearby neighbors. _____	
___ 58.	List of children/youth in church/neighborhood; ages of children in parsonage family where applicable. _____	
___ 59.	List of dependable baby sitters, addresses, ages and phone numbers. _____	
___ 60.	Helpful information on lawn care, etc. Does church provide any services and if so, with whom? _____	
___ 61.	Any traditions in the church involving the parsonage such as annual open house, etc. _____	

E. SOME FINAL PREPARATIONS

___ 62.	Arrange for cleaning of parsonage -- you are ultimately responsible for this. _____	
___ 63.	Leave set of labeled keys for <u>parsonage</u> and <u>church</u> . _____	
___ 64.	Leave information about mail delivery system. _____	
___ 65.	Leave file with information on appliances, parsonage repairs. _____	
___ 66.	Leave information on service companies to call. _____	
___ 67.	Identify fuse box locations and provide information on special items like sprinkler system, garage door openers, alarm systems, etc. _____	
___ 68.	List of doctors, dentists, etc., that might be immediately helpful. _____	

Note: Feel free to copy this check list. You can assign MANY of these tasks to OTHER persons.

It is helpful to have the information suggested in this check list provided in an orderly fashion in note books on the pastor's desk at the time of his/her arrival.

It requires work to prepare adequately for our successor. AS PROFESSIONALS, we want to prepare well for our successor. There is no excuse not to and every good reason to do so. There is the therapeutic value in organizing materials for your successor -- it helps you to feel good about completing your work and good about giving the new pastor vitally important information.

AN ORDER OF FAREWELL FOR A PASTOR

from *The United Methodist Book of Worship*

This order may be used within a service of worship on the last Sunday before a pastor moves to another congregation or retires, or it may take place at a special service. It may be adapted to be an order of farewell to a member of the church staff other than the pastor.

As a Response to the Word, the lay leader or another designated leader comes forward and announces that the time has come to say farewell to the pastor.

One or more persons may recall with thanksgiving the pastor's ministry.

A gift or symbol may be given with appropriate words of thanks.

A stole may be left to place on the next pastor.

The pastor and congregation may release one another with these or similar words:

I thank you, the members and friends of *Name* United Methodist Church,
for the love and support you have shown me
while I have ministered among you.

I am grateful for the ways my leadership has been accepted.
I ask forgiveness for the mistakes I have made.
As I leave, I carry with me all that I have learned here.

**We receive your thankfulness, offer forgiveness,
and accept that you now leave to minister elsewhere (retire).
We express our gratitude for your time among us.
We ask your forgiveness for our mistakes.
Your influence on our faith and faithfulness
will not leave us with your departure.**

I accept your gratitude and forgiveness, and I forgive you,
trusting that our time together and our parting
are pleasing to God.
I release you from turning to me and depending on me.
I encourage your continuing ministry here
and will pray for you and for your new pastor, *Name*.

The pastor may pray extemporaneously, or the pastor and congregation may join in the following prayer:

**Eternal God, whose steadfast love for us is from everlasting to everlasting,
we give you thanks for cherished memories
and commend one another into your care as we move in new directions.
Keep us one in your love forever, through Jesus Christ our Lord. Amen.**
A hymn may be sung.

SECTION II

BEGINNINGS

THE ROLE OF THE CHURCH ON SAYING WELCOME!

The kind of welcome that is extended to the pastor/family often sets the tone for the relationship which will exist between pastor and congregation. It is difficult to adequately prepare a farewell for one pastor/family and at the same time prepare to welcome the new pastor/family. This is uniquely United Methodist. And yet, as challenging as it may be, it is essential that both the "letting go" and the "embracing" be equally fulfilled. Above all, feel free to be creative and to plan to make the welcome one of joy and real excitement.

Following are some guidelines to assist you in welcoming the new pastor/family. The primary responsibility for this rests with the chair/members of the S/PPR committee.

- 1. S/PPR Chair:**
The chair of the S/PPR Committee is encouraged to call the in-coming pastor as soon as possible to voice a welcome.
- 2. S/PPR Committee**
The chair may want to consult with the pastor on a time when the new pastor can visit the parsonage and meet with member of the S/PPR Committee or others. The goal in all of this is to give the new pastor/family a real sense of welcome! It is **not** recommended that people from your church go to visit the new pastor at his/her present church.
- 3. Extend an early welcome!**
Encourage some of the church leaders to write notes/letters of welcome to the new pastor/family-- this is generally better than a lot of phone calls.
- 4. Remember the children:**
If there are children/youth in the incoming pastor's family, consider ways to help them feel welcome. You are encouraged to think creatively.
- 5. Formal announcement:**
The S/PPR Committee chair needs to be responsible for an article announcing the appointment of the new pastor in the local newspaper(s) a few days prior to the coming of the pastor.
- 6. Welcome reception?**
The S/PPR Committee chair should communicate/discuss with the incoming pastor plans to welcome his/her family. This can include such things as a reception, fellowship gathering, neighborhood groups, etc.
- 7. Moving plans:**
The S/PPR chair needs to discuss with the incoming pastor plans involving moving day schedule, etc. (see guidelines under moving).
- 8. First Sunday:**
The S/PPR chair needs to be the primary contact person relative to the first Sunday. Discuss your role in terms of presenting the pastor/family to the congregation. Mutually agree how this will be done in the context of worship/reception/order of worship, parish newsletter, etc.

9. S/PPR meeting with new pastor:

Discuss with the incoming pastor a date for your first S/PPR Committee meeting. Announce this meeting to the congregation in worship or through the bulletin/newsletter.

10. Congregation understanding:

Discuss ways of encouraging the congregation to welcome the new pastor and to be patient as he/she learns names/traditions of the church.

11. Expectations of new pastor:

It is important for the S/PPR Committee to meet with the pastor within the first couple of weeks. One of the responsibilities of the chair is to use the "Expectations of the Pastor's Role" (included in this booklet) with the Committee/Pastor at the very first meeting. This allows for understandings to be clear. This instrument then becomes the basis for review of the pastor's ministry in the months ahead.

Also, be sure a clear understanding is established regarding office hours, time off, etc. Support your pastor in the discipline of keeping regular hours to be available to the congregation as well as time for personal replenishment. It is helpful to interpret to the congregation that pastors are generally heavily committed on weekends and need to take time off during the week.

In that first meeting, discuss with pastor any understanding you have about policies relating to weddings, funerals, etc. Share church goals with the pastor. In the first meeting, go over the pastor's compensation and pay periods. Be clear about such things as using church van, phone bills, purchase/payment of office supplies, etc.

Set dates for future meetings; you may want to meet more frequently the first year.

Remind the S/PPR Committee that it is the primary listening and support group for the pastor.

12. Vacation plans:

Discuss vacation time immediately. Remember that since the United Methodist Church has an itinerant ministry, if the pastor has not had a vacation prior to the move, then it is appropriate and important to enjoy a vacation before the end of the year.

The conference recommended guidelines for vacation for clergy, based on total years of service, are as follows:

0-5 years	2 weeks
6-10 years	3 weeks
11+ years	4 weeks

13. Church leaders' meeting:

Consider arranging a meeting of the lay leader and persons of various groups in the church with the new pastor. This might be a dinner or an informal gathering.

Hopefully the new pastor will not be put in a position of needing to make major decisions during his/her first weeks. This beginning time ought to provide opportunities for getting to know the congregation.

Please remember that these are not rules but suggestions to stimulate your thinking. You have a sacred trust. Pray for wisdom and insight.

EXPECTATIONS OF THE PASTOR'S ROLE – FOR PPR COMMITTEE

To be used with the new pastor at first meeting of PPR Committee.

How important is each pastoral function to you? Circle the number 6 if you think the function is extremely important, 1 if you think it is unimportant, 2, 3, 4, or 5 if you estimate it somewhere in between.

1. Works with adults in adult religious education classes and/or special seminar series, etc. 1 2 3 4 5 6
2. Participates in community projects and organizations, such as service clubs, United Way, etc. 1 2 3 4 5 6
3. Ministers to the sick, dying and bereaved. 1 2 3 4 5 6
4. Leads corporate worship. 1 2 3 4 5 6
5. Works with congregational boards and committees. 1 2 3 4 5 6
6. Maintains a disciplined program of prayer and personal devotion. 1 2 3 4 5 6
7. Accepts speaking engagements before community and civic groups, for special community occasions or radio/TV. 1 2 3 4 5 6
8. Oversees church office activities, church bulletins, correspondence, records etc. 1 2 3 4 5 6
9. Tries to maintain harmony and resolve conflict among church members over church programs, finances and elections. 1 2 3 4 5 6
10. Prepares and preaches sermons. 1 2 3 4 5 6
11. Visits new residents and recruits new members. 1 2 3 4 5 6
12. Counsels with persons about their personal problems. 1 2 3 4 5 6
13. Follows a disciplined program of continuing education. 1 2 3 4 5 6
14. Works with children, visits children's Sunday School classes, gives children's sermons, etc. 1 2 3 4 5 6
15. Assists victims of social neglect, injustice, and prejudice; cooperates with social services and charitable programs. 1 2 3 4 5 6
16. Leads the congregation to an increasing openness in experiencing the racial ethnic inclusiveness of The United Methodist Church. 1 2 3 4 5 6
17. Works with young people (junior and senior high) in classes and/or fellowship groups. 1 2 3 4 5 6
18. Administers baptism and communion, conducts weddings and funerals. 1 2 3 4 5 6

- | | |
|--|-------------|
| 19. Cultivates a home and personal life with some friends and interests outside local church activities. | 1 2 3 4 5 6 |
| 20. Leads financial drives and building programs | 1 2 3 4 5 6 |
| 21. Talks with individuals about their spiritual development, religious life and beliefs | 1 2 3 4 5 6 |
| 22. Participates in denominational activities and conferences. | 1 2 3 4 5 6 |
| 23. Presents denominational programs to the congregation. | 1 2 3 4 5 6 |
| 24. Helps plan church budget and helps oversee church finances. | 1 2 3 4 5 6 |
| 25. Fosters fellowship at church gatherings. | 1 2 3 4 5 6 |
| 26. Serves as an example of high moral and ethical character. | 1 2 3 4 5 6 |
| 27. Maps out objectives and helps plan over-all church strategy and programs. | 1 2 3 4 5 6 |
| 28. Interests capable people in church activities; recruits and enables lay leadership. | 1 2 3 4 5 6 |
| 29. Visits regularly in the homes of the congregations(s). | 1 2 3 4 5 6 |
| 30. Counsels people facing major decisions of life, such as marriage. | 1 2 3 4 5 6 |
| 31. Supplies new ideas for activities. | 1 2 3 4 5 6 |
| 32. Promotes enthusiasm for church activities. | 1 2 3 4 5 6 |
| 33. Gives oversight to the total educational program of the church. | 1 2 3 4 5 6 |
| 34. Leads confirmation classes for youth and adults. | 1 2 3 4 5 6 |
| 35. Oversees the church staff. | 1 2 3 4 5 6 |
| 36. Develops relationship with Lay Leader and formulates a partnership for ministry. | 1 2 3 4 5 6 |
| 37. Develops goals, plans and worship service format in partnership with Lay Leader. | 1 2 3 4 5 6 |

Now that you have completed the questionnaire, please go back and draw a circle around the number (to the left of the page) of the five functions that you consider most important.

If this is the first meeting of a pastor with his/her S/PPRC following a move, discuss the following:

1. Issues of transition: parsonage, schools, spouse employment, insurance, compensation package as understood by pastor and S/PPRC, vacation time, travel obligations the pastor has, etc.
2. Church policies and traditions (written and unwritten).
3. Dates for future S/PPRC meetings (at least once each quarter).

THE ROLE OF THE PASTOR ON BEGINNING AGAIN

Most of you know what it means to "begin again." And hopefully, you feel good about your new appointment. That will make it much easier. And you also know how to make the transition, so the suggestions here are minimal reminders.

1. Become familiar with laity expectations:

Please take the time to read what is being asked of the laity in your new appointment. (pages 19 - 20 in this booklet)

2. Have you been contacted?

If the S/PPR chair and/or pastor of the church you are going to have not contacted you, please call the district superintendent to discuss this.

3. Remember your family!

Remember, if you have family, schedule time to be with them. Often pastors have a ready group of people with whom to develop relationships and have fresh challenges to meet, while a spouse/child may suffer enormous loneliness.

4. Expect grief:

Do not be surprised if you suddenly miss your former congregation more than you thought you would. The familiarity and comfort of your former church can be very attractive at this point.

5. You are still a stranger:

Remember that the new congregation does not love you yet nor should it be expected to love you. More likely they love your predecessor. We are not called to be loved but to love and serve. Serving others with compassion, sensitivity, openness and competence will win their respect. The love will come later!

6. Meeting with S/PPR committee:

Set as a high priority your meeting with the S/PPR committee and developing a clear set of expectations. (See information provided chairs of S/PPR committee for first meeting and the sheet, "Expectations of the Pastor's Role.")

7. Moving plans:

Be clear with S/PPR chair and your predecessor when you will move in and when you will have the order of worship information sent to your new church. Discuss with the chair of the S/PPR committee your feelings about the best way and time to be introduced to the congregation. Arrive at a mutual agreement. You may wish to consider the "Order for the Celebration of an Appointment" in the first service. (See copy of this on pages 26 - 27.)

8. Basic commandments:

Remember the fundamental commandments: *'You shall love the Lord your God with all your heart, and with all your soul, and with all your mind.'* This is the greatest and first commandment. And a second is like it: *'You shall love your neighbor as yourself.'* On these two commandments hang all the law and the prophets. Matthew 22:37-40 NRSV

9. Another basic commandment:

Do not talk constantly about previous pastorates. Lay people don't want to hear this any more than you want to be compared to the former pastor.

10. Parsonage ready?

Hopefully the parsonage will be ready for you when you arrive. If there are problems, deal with them thoughtfully and avoid unnecessary disputes. If there are major problems, please call the district superintendent.

COVENANT MEMBERSHIP

This is an important excerpt on "Joining", both emotionally and spiritually, the church to which you are appointed.

The hire-and-fire mentality of the North American society has reduced the pastor's ministry to a buy-and-sell commodity. A pastor with a vision to equip all the members for ministry, as proposed in Ephesians 4:11-12, is apt to run into the mentality, "We hired *you* to do the ministry." Quaker Elton Trueblood gave his life to promoting the radical ideal that pastors are not called to get the people to assist them with their ministry; rather, the pastor is called to assist the people, the laity, with *their* ministry both in the church and in the world. It will take a gracious conspiracy between pastor and people to bring this change about. But the change will not even begin unless the pastor joins the church (or becomes an element of the system, to use systems terminology). *The people must perceive that the pastor is really part of the system.*

Pastors themselves are not free from the seductions of a commodity society. It is all too easy to consider being a pastor as "my job" and to bring to a pastoral assignment a predetermined set of role expectations, sometimes reasonable expectations negotiated during the search process. When things do not go the pastor's way or the people do not seem to want to change, the pastor can struggle with flashbacks to a previous better job, begin the search for another church assignment, or be resigned to quiet desperation. But covenant (and systems leadership) requires more. It requires **taking the risk of joining the church and taking the risk of being changed by *this church*.**

Commitment is a big word these days, but covenant is a bigger word. Covenant implies that relationship is more important than performance, that belonging is more important than succeeding, that being is more important than doing. Contracts are conditional; covenants are essentially unconditional. But continuing "for better, for worse" is not embracing a self-inflicted death sentence or locking oneself in a relational prison. It is an invitation to go deeper with God and God's people. Without saying so most people want contracts--negotiated exchanges of goods and services--that can be broken if one partner breaks the contract. Churches easily fall into the trap of thinking they can define the pastoral ministry contractually, as an exchange of services in return for remuneration. But Christian ministry is essentially covenantal. There is a "for better, for worse" about it, a bonding and binding agreement to work this thing out for God's glory and for the up building of the body of Christ because we *belong together*. As we shall see, biblical covenant corresponds to the modern understanding of systems theory.²

AN ORDER FOR THE CELEBRATION OF AN APPOINTMENT
from *The United Methodist Book of Worship*

This order is intended primarily for use within a corporate service of worship. It may be led by the chairperson of the PPR Committee, Lay Leader and/or by some other designated leader in the congregation.

Before the reading of the Scripture lessons, the pastor comes before the Lord's table and the person officiating says to the congregation:

Dear friends, today we welcome (Name), who has been appointed to serve as pastor of (name of church).

We believe that (he/she) is well qualified and has been prayerfully and wisely appointed.

The person officiating then says to the pastor:

(Name), you have committed yourself to live among us as a bearer of the Word of God; minister of the sacraments; and sustainer of love, order, and discipleship of the people of God.

The pastor responds:

Today I reaffirm this commitment in the presence of this congregation.

The person officiating says to the congregation:

Brothers and sisters in Christ, as a people committed to participate in the ministries of the church by your prayers, your presence, your gifts, your service, and your witness, will you who celebrate this new beginning support and uphold
(Name) in these ministries?

The congregation responds:

We have committed ourselves, and we reaffirm our commitment.

The person officiating continues:

Let us pray.

Eternal God, strengthen and sustain us in our ministries together, with (Name) as our pastor. Give (him/her) and us patience, courage, and wisdom so to care for one another and challenge one another that together we may follow Jesus Christ, living together in love, and offering our gifts and talents in your service, through Jesus Christ our Lord. Amen.

As the pastor stands at the Lord's table, several people come forward to make presentations. As these are received, the pastor places them on the table. Other presentations may be made and some here omitted, as deemed appropriate.

Presenter: (Name), accept this Bible, and be among us as one who proclaims the Word.

Pastor: **Amen.**

Presenter: (Name), take this water, and baptize new Christians in this place.

Pastor: **Amen.**

Presenter: (Name), take this bread and cup, and keep us in communion with Christ and his Church.

Pastor: **Amen.**

Presenter: (Name), receive this hymnal, and guide us in our prayers and praise.

Pastor: **Amen.**

Presenter: (Name), receive this stole, and shepherd us as a pastor.

Pastor: **Amen.**

Presenter: (Name), receive this *Book of Discipline*, and strengthen our connections as United Methodists.

Pastor: **Amen.**

Presenter: (Name), receive this globe, and lead us in our mission to the community and the world.

Pastor: **Amen.**

Pastor: **Let us pray.**

Pastor and Congregation:

Lord God, bless the ministries of your church. We thank you for the variety of gifts you have bestowed upon us. Draw us together in one Spirit, that each of us may use our differing gifts as members of one body. May your Word be proclaimed with faithfulness, and may we be doers of your Word and not hearers only. As we who have died and risen with Christ in baptism gather at His table and then scatter into the world, may we be one in service to others, in the name of Jesus Christ our Lord. Amen.

Pastor: The peace of the Lord be always with you.

Congregation: **And also with you.**

STAFF SENSITIVITIES

Most churches have some staff in addition to the pastor. The larger the staff, the more complex a transition becomes. It is essential that the chair of the Pastor Parish Relations Committee keep the staff informed of anticipated pastoral changes and arrange for the staff to be included in planning both the farewell and welcome.

Many times, staff members feel the greatest guilt/grief/loss/threat in a pastoral change.

Pastors who are leaving and pastors who are coming will want to be sensitive to the concerns of the staff. There is enormous value in providing quality time with the staff and the departing pastor to seek closure as well as quality time (preferably an overnight retreat) for staff and the new pastor(s).

It is important that job descriptions/expectation of all staff persons be updated prior to a move and be available to the incoming pastor.

How well the staff and new pastor make the transition will likely determine how well the new pastor does.

Finally, it is essential for the former pastor to relinquish all professional relationships with staff persons in the church from which she/he has moved.

PASTORAL TRANSITIONS

A Time for Learning and Growth

An article by Edward A. White, Senior Consultant, Alban Institute⁴

One of the great ironies of life is that we resist change although change can often cause us to learn. We avoid conflict although conflict can be the cause of spiritual growth both for the individual and the community. We avoid pain, although pain is one of the most powerful teachers in the world.

There is a powerful scene in Lily Tomlin's dramatic presentation entitled, "The Search for Signs of Intelligence in the Universe." Lily plays the part of a young teenage punk rocker named Agnes Angst who is struggling with the meaning of her life and her relationships. She is embittered by the rejection of her parents. Agnes undertakes to follow the advice of G. Gordon Liddy, namely, that you can make anything become true if you simply will it intensely enough.

Agnes wills not to feel any more pain. The house lights dim and Agnes lights a candle in the darkness. But instead of seeing the light as a symbol of hope, Agnes holds her hand over the flame and intones: "This does not hurt! This does not hurt! Oh, my God, it hurts!"

Of course it hurts if you're a human being.

To become immune to pain is to become immune to life.

The predilection of both clergy and congregations to avoid change, conflict, and pain has produced:

1. bland congregations where coffee hour conversation is usually confined to the weather and professional sports...
2. bored consumer-oriented parishioners who exercise the uncreative options of dropping out or blaming the pastor...
3. clergy who go through the motions of proclaiming a faith that is no longer real or compelling to them...
4. congregations who see little connection between faith and daily life...
5. a secular culture that is unchallenged by the Gospel...

The beginning of hope might come as we explore the question: **"What is the Lord telling us through the transitions of our lives and our life together?"**

The most debilitating failure is not the mistakes we make. The most debilitating failure is that of not discerning the opportunities to learn and grow!

Joel Barker in his video on *Paradigms* illustrates the price that Swiss watchmakers paid for discounting an opportunity to learn. In 1968 Switzerland had 65% of the world watch market. It was a Swiss research group that developed the quartz movement watch. However the Swiss watchmakers didn't take seriously the new development because it was so unlike the traditional watches that the Swiss had long excelled at making. Ten years later the Swiss controlled less than 10% of the world watch market. The Swiss "got stuck in history" and history left them behind.

Pastors and congregations can get stuck in history, too, especially if they fail to see transition times as opportunities to learn and grow.

The transition of a pastor from seminary to the first parish can be a time of testing as one learns to respond to the expectations of a congregation instead of the expectations of a seminary faculty. Some new clergy fail to make this transition and leave the pastoral ministry after just two or three years.

The first year of any new pastorate is an opportunity for both pastor and people to learn and grow. Getting to know each other means getting to know each other's stories. Our story reveals our identity...our self. How can the pastor's self and the congregation's self engage each other in a manner that produces mutual growth?

Times of leaving are also times of growth! Often the pastor is tempted to just "slip away into the night" like the Lone Ranger, in order to avoid the pain of saying goodbye. But unfinished relationships and unresolved issues can contaminate the next chapter in the life of both pastor and congregation, even though those futures be separate. We carry the unfinished business of the former relationship into the next pastorate. The effort to avoid pain creates pain.

Sometimes pastors stay in one congregation for a long time. Sometimes "hardening of the categories" sets in and pastor and people experience a slow but steady stagnation. How can one generate "transitions" in a long pastorate so that there can be stages of growth and renewal in the shared life that enable both pastor and people to keep on growing? How can pastor and people together overcome the seduction of inertia in order to discern new horizons of ministry and communion? How can healthy conflict arise to liberate a congregation from an artificial and stifling "peace"?

There is a predilection on the part of many clergy and lay leaders to avoid conflict because past conflicts have been experienced as destructive. Past church fights have produced permanent and unreconciled divisions with lasting bitterness and hurt. Ironically, the very tactics of avoidance that were intended to keep the peace have produced the destruction. There has been manipulation and indirect aggression instead of healthy and mutually respectful confrontation. Hugh Halverstandt, in his book *Managing Church Conflict*, (Westminster/John Knox Press, 1991), makes a helpful distinction between "fair fight" and "dirty fight" and provides excellent ground rules for a fair fight through which both participants and community can grow in grace, vision, and understanding.

Congregations and pastors that do not learn how to grow and change together will stagnate and die, either together or separately. For the pastor especially, the capacity to lead a congregation and to manage conflict well in a rapidly changing world requires attention to the inward journey and the development of a capacity to cope with fear in fearful situations. How does a leader address the fear of threat, the fear of rejection, the fear of failure?

When Jesus said, "Those who seek their life will lose it", he was speaking to pastors and to congregations. In a culture that tends to be preoccupied with security, those congregations which can be liberated from this preoccupation stand the best chance of making a significant witness to the Gospel. Such congregations will be led by pastors who have learned how to be in the midst of transition and therefore how to lead in transition.

A friend of mine has a tee shirt with the words, "Life is a temporary assignment." Grasping for permanence reveals a lack of trust in the One who teaches us to "take no thought for our lives...but to seek first the Kingdom."

SECTION III

GUIDELINES

RESOURCES

PARSONAGE/MOVING GUIDELINES

FOR THE CHURCH

The PPR chair is the one primarily responsible to work with the out-going pastor/family, incoming pastor/family, trustees and parsonage committees. Parsonage issues are one of the most sensitive areas in the entire transition process. Honesty and sensitivity are equally required. Some things that the church can be aware of:

1. **Moving Day**

It is understood that ideally the current pastor/family will be out by noon on moving day and the incoming pastor moves in that afternoon. Additionally, the parsonage is to be cleaned and all trash removed. It is an almost impossible task. Several suggestions may help deal with this:

- a) The current pastor moves out and the present church or receiving church pays for overnight charges for storage on moving van. This allows for time for clean up, paint, etc. and provides the gift of a night between appointments for the pastor.
- b) Support the incoming pastor in making his/her own moving arrangements. Moves can often be frustrating, but if the pastor has made his/her own arrangements, he/she takes responsibility for it being a good move and on schedule.
- c) Visit the parsonage weeks before the move and schedule with present pastor when certain repairs can be done.
- d) The chair of the PPR committee or someone designated by the chair (such as chair of parsonage or trustees) needs to be present when the current pastor/family leaves to agree that the parsonage is left ready for the new pastor or proper arrangements have been made to have it ready. It is important for everyone to be specific about this.
- e) Have someone on hand to greet the new pastor/family. Generally it is an act of kindness to ask if there is anything you can help with and then leave so the pastor/family has some privacy as they begin to make the church house their home!
- f) An additional act of kindness is to have an evening meal provided for the pastor/family and some food for breakfast. One reason it is an act of kindness is that it lifts some of the pressure from the pastor who generally cannot even begin to move until the afternoon, plus even on moving day there are some church matters that must be attended to.

- g) Some churches will have cut flowers or special welcome treats for the children/youth at the parsonage.

Use your imagination to guide you in creating a warm welcome!

2. The 2016 Alabama-West Florida Conference Journal outlines the minimum standards for parsonages. See pages 34-26.
3. See page 37 for suggested procedures for inspecting parsonages when there is a move of pastors. If there are any difficulties which cannot be resolved between you and the outgoing pastor, please contact the district superintendent.
4. Please plan in advance of moving day to have an inventory sheet prepared of items owned by the church that will remain in the parsonage. This inventory sheet needs to be checked with the out-going and incoming pastors on moving day.
5. Please have ready and on hand the form and amount of payment required by the moving company. Many companies demand payment at time of move and many will not accept a church check.
6. Remember to work with out-going pastor to insure **all** utilities remain connected!

Parsonage Standards

(adopted at the 2016 Annual Conference)

The *Book of Discipline* states, "Housing provisions shall comply with Annual Conference housing policy and parsonage standards." In order to establish a housing policy and housing standard the Annual Conference recommends three options available for the local church. The Annual Conference does not put one option above the other. The options are co-equal, depending upon the local situation.

The Charge Conference shall review the recommendations of the Pastor-Parish Relations Committee regarding provision of adequate housing for the pastor(s) of a local Charge in consultation with the District Superintendent, the Charge shall choose one of these three options.

OPTION ONE

Housing Allowance: Any congregation considering a housing allowance shall consult with the District Superintendent to understand all the positive and negative aspects of housing allowances. Before implementing a housing allowance, a congregation must obtain the District Superintendent's permission. The congregation must present a tentative draft budget for the first two years and demonstrate the impact of the change on the overall fiscal health of the congregation. If the congregation decides to sell an existing parsonage, the church leadership shall follow the Discipline guidelines for selling the parsonage and using the proceeds of the sale.

Upon recommendation of the Pastor-Parish Relations Committee and the Board of Trustees with approval by the Finance Committee, the Charge Conference

shall provide an annual housing allowance. The housing allowance shall not be considered as part of compensation or remuneration of the pastor(s).

OPTION TWO

Upon recommendation of the Pastor-Parish Relations Committee and the Board of Trustees with approval by the Finance Committee, the Charge Conference shall provide a parsonage that furnishes only major appliances, installed floor covering and window dressing.

OPTION THREE

Upon recommendation of the Pastor-Parish Relations Committee and the Board of Trustees with approval by the Finance Committee, the Charge Conference shall provide an adequately furnished parsonage, with quality furnishings, that complies with these standards:

REQUIRED MINIMUM STANDARDS

In addition to the *Discipline* requirements for parsonages the following is required for all parsonages, in the Alabama -West Florida Annual Conference:

'Electrical wiring that meets code and is sufficient to meet today's needs for electricity.

'Climate control - both heating and air conditioning

Rooms:

'Living Room or Great Room

'Dining Room or eating area large enough for at least 8 people

'Kitchen

.3 bedrooms

"2 baths

'Indoor laundry area

'Shelter for 2 vehicles

'Secure storage area

Equipment:

Good quality, dependable appliances:

'Stove

'Microwave

'Dishwasher

'Refrigerator with freezer compartment

"Washer and dryer

'Hot water heater of at least 60 gallons

"Wired for basic cable or satellite dish service

'Maintained smoke alarms

'Current fire extinguishers for kitchen and other required areas

- Vacuum, if there are carpets

If no lawn service and pastor is expected to maintain lawn the following are minimum requirements:

'Gas mower, Trimmer or weed eater

Furnishings:

'Quality window coverings in neutral colors that insure privacy

'Quality floor coverings in neutral colors that is durable and easy to maintain

Maintenance:

'Regular pest control inspection and treatment

"Annual termite inspection and treatment

'Landscaping and maintenance thereof should be representative of the neighborhood.

'Regular schedule for painting both on the outside and inside of the house as needed. Any needed

repairs should be done in a timely manner

'Annual carpet cleaning

'Regular maintenance and cleaning of chimneys if one exists

CARE OF THE PROPERTY

1. The pastor and family should care for the parsonage as good stewards for the Lord's property, carefully avoiding undue wear and tear, but at the same time they should "be at home" in the parsonage, knowing that the home and furnishings are to be used with inevitable and expected depreciation.
2. The pastor and family are responsible for the repair or replacement of furnishings when, through negligent use of furnishings, breakage results, but ordinary wear and tear, such as is expected when a house is lived in, is the responsibility of the Board of Trustees/Parsonage Committee.
3. The church shall provide an adequate amount of insurance of the building, furnishings, and equipment and for public liability. The minimum amount of insurance carried on the parsonage should be equal to 80% of the replacement value of the building, furnishings, and equipment. *All clergy families are responsible for insuring all of the family 's personal items.*
4. There shall be a plan identifying repairs, replacements or additions that need to be made to the parsonage. All broken and worn-out furniture or equipment should be removed.
5. The Board of Trustees in consultation with the parsonage committee shall keep the parsonage and furnishing in good repair. They shall furnish the clergy family with a list of those church members who can do minor repairs and the names of repair companies with whom the church does business. A list of procedures to follow when repair work is needed should also be given to the clergy family
6. Regular pest control inspection and treatment, annual termite inspection and annual carpet cleaning should be budgeted.
7. The pastor and spouse should be consulted in the selection of furnishings and equipment.
8. If the vacating parsonage family had pets they shall be responsible for having the house and yard treated for fleas and other parasites before moving. They shall also be responsible for having the carpeting and upholstery cleaned and must vacate the house early in order to allow for this process to occur.
9. Each pastoral charge should place an amount in the budget annually for normal maintenance and repairs to the building, furnishings, and equipment or the replacement of same if necessary.

Part 1 of 2
2018 PARSONAGE INSPECTION FORM

At least 1 month prior to moving day, the parsonage is to be inspected by the current pastor, chair of the S/PPR committee, the chair of the trustees/chair of the parsonage committee and other designated committee members to determine what repairs need to be done and what furnishings need to be replaced. The primary purpose is to identify maintenance issues that need to be completed by moving day. This includes repairs, cleaning, upgrades of furnishings and trash removal. The goal is for the parsonage to be ready for the incoming pastor to move in. This inspection should occur at a mutually scheduled time between the current pastor and committee representative.

Church/charge: _____

Location: _____

Date of Parsonage Inspection: _____

Names of those participating in the inspection:

Issues Identified:

(Please state each maintenance issue that is to be addressed and who will be responsible for assuring the completion of each project by moving day, June 19, 2018.)

This is part 1 of a 2-part form. Please complete part 2 which is found on the back side of this form on the day of the move. Once you have completed BOTH sides of the form, please provide a copy for the former pastor, new pastor, chairperson of the parsonage committee/trustees, and the district superintendent.

Part 2 of 2
2018 PARSONAGE INSPECTION FORM

Church/charge: _____

Location: _____

On _____ (moving date) I/we have inspected the parsonage preceding the move of our outgoing pastor and have found the following:

1. The floors and carpet were clean: _____ Yes _____ No.
If the answer is NO, please explain:
2. All appliances were clean and in working order: _____ Yes _____ No.
If the answer is NO, please explain:
3. Kitchen cabinets, closets, and other storage areas were left clean:
_____ Yes _____ No. If the answer is NO, please explain:
4. Parsonage-owned furniture was left in the following condition:
_____ excellent _____ average _____ poor
If the answer is other than excellent, please explain:
5. Bathrooms were left clean including showers, tubs, etc.: _____ Yes _____ No.
If the answer is NO, please explain:
6. A current inventory of all parsonage furnishings was left for the new pastor and trustees:
_____ Yes _____ No. If the answer is NO, please explain:
7. Other comments:

_____ We accept the condition of the parsonage as described above and take responsibility for the parsonage as is. We will work with the incoming pastor to address any remaining maintenance issues and will have the parsonage fully ready for the incoming pastor to move in.

_____ We do not accept the condition of the parsonage as described above. We have sought to address any issues with the outgoing pastor and have contacted the District Superintendent to assist in resolution of any remaining concerns.

Signed: _____
(PPR Chairperson or designated representative)

(Outgoing Pastor)

Copy: Former Pastor, New Pastor, Chairperson of Parsonage Committee/Trustees, District Superintendent

Report No. 11 - MOVING GUIDELINES and EXPENSES

The second Sunday following the adjournment of Annual Conference shall be the last Sunday of pastoral responsibility for each conference year. The official moving day will be Tuesday, June 19, 2018 and may be adjusted according to the needs and concerns worked out in consultation with the clergy persons, the churches and approved by the District Superintendent.

The entire June salary shall be paid to the pastor by the church from which he/she is moving. In effect 50% of the annual salary will be paid January through June; with the remaining 50% paid by the church receiving a new pastor. Health insurance contributions and/or premiums, as well as any UMPIP payments are to be deducted from the pastor's compensation for the full month of June, with the receiving church beginning such payments in July.

Upon retirement, disability, termination, or death of a minister serving within the bounds of the Annual Conference and serving a full time appointments under the provisions of ¶333.1 of the *2016 Book of Discipline of the United Methodist Church*, the conference shall pay up to \$3,000 for documented moving expenses to the first place of retirement, termination, or disability or the first place of dwelling for a surviving spouse. Moving expenses to be reimbursed shall not be incurred prior to retirement or termination notification to the Bishop and will be reimbursed after the move is completed.

Guidelines for clergy under appointment:

1. Following notification of appointment change by the district superintendent, the Chairperson of the PPRC should contact the minister to be appointed to communicate the church's policy in paying moving expenses and to discuss moving plans.
2. The receiving church is responsible for the first \$3,000 of documented moving expenses and is encouraged to pay all documented expenses for the incoming ministerial family.

3. Qualified Moving Expense Reimbursement Exclusion—Temporary Suspension

Before 2018, qualified moving expense reimbursements provided by employers to employees were excludable from gross income if the reimbursements satisfied requirements of Section 132(f) of the Internal Revenue Code (the Code). Under the Act, this exclusion from gross income has been suspended (i.e., temporarily repealed) for tax years 2018 through 2025. In 2026, the moving expense reimbursement exclusion will again become effective (unless the suspension is repealed or made permanent by future legislation).

Unfortunately, this means that moving expense reimbursements provided by employers to employees (e.g., by an annual conference or local church to clergy) in years 2018 through 2025 will be taxable income to employees. Although the IRS guidance on *Form W-2* reporting for 2018 may not be published for some time, Wespath reasonably presumes this will be reported along with other taxable income on an employee's *Form W-2*. For clergy, the impact of losing this exemption means that the reimbursements will become "net earnings from self-employment," so that the reimbursements will be subject

to self-employment (SECA) taxes as well as income taxes (an increased financial impact). Along with the loss of the reimbursement exclusion, moving expenses paid by individuals also will not be deductible through 2025.

One important point on this particular change is that, because moving expense reimbursements are now taxable income (through 2025), they are also considered “plan compensation” under the Clergy Retirement Security Program (CRSP), the United Methodist Personal Investment Plan (UMPIP) and the Comprehensive Protection Plan (CPP). Inclusion of moving expense reimbursements in the definition of taxable income (and, therefore, “plan compensation”) will increase the amount on which accrued benefits, plan sponsor contributions, disability benefits and CPP premiums are based.

At the introductory meetings for moving pastors, District Superintendents should complete and sign two comp forms. The first form should be turned in immediately. The second form should be left with the PPR Chair to be completed with the moving expenses information (line 4) and returned to the district office by August 1.

PARSONAGE/MOVING GUIDELINES

FOR THE PASTOR

The parsonage can be a wonderful place where you are received graciously. It can also be a place where you feel out of control and discounted. You can easily feel patronized by the parsonage system. Yet many times it affords a comfortable environment that is made ready with food and flowers for you without any investment of energy in finding a place to rent or buy. However, implications of parsonage life can be very stressful.

Please read over the guidelines and expectations for the church and be clear about your own responsibilities as defined by the Annual Conference.

Please read information provided under this heading for the laity.

1. Hopefully you have already visited the parsonage to which you will be moving or have satisfied yourself with what to expect. Obviously this is one of the most awkward pieces of the transition: how to express concern for what needs to be done before you arrive without appearing demanding. There is no easy way through this in some instances. In most cases you can come to an understanding with the PPR committee on what to expect and what will be satisfactory.
2. You are responsible to make your own moving arrangements. This requires financial stewardship in this matter.
3. Inform the chair of your new PPR committee of your moving arrangements, expected costs, form of payment and scheduled arrival time.

4. The parsonage family is responsible for leaving the house and furnishings clean when moving to another appointment. Conference policy requires that you "always leave the parsonage in better condition than it was found." This means nothing unusable should be left in storage areas (attic, garage, basement, etc.) All garbage should be removed from property.
 - a) Have repaired at his/her expense any damage due to negligence and/or pets.
 - b) Have made sure the utilities are on for the incoming pastor. Utilities, where practical, should be in the church's name, with the parsonage address to negate termination of services.
 - c) Pastors are responsible for lawn and trimming of shrubs.

Please refer to "Parsonage Standards" (p. 34-36) in this booklet. Your help at this point can make the transition easier for your sisters/brothers in the ministry.

FOR CHURCH AND PASTOR

Here is a worksheet to assist both the S/PPR Committee and pastor to develop personnel policies/manuals if none are in place.

GUIDELINES FOR DEVELOPING CHURCH PERSONNEL POLICIES

Questions To Be Considered In Formulating Personnel Policies

1. **What policies are now operative?**
 - a) Policies formulated, printed and circulated
 - b) Policies contained in minutes of
 - Charge Conference
 - Administrative Board/Council
 - Annual Conference
 - c) Policies contained in job descriptions, contracts, letter of agreement, trusts
 - d) Policies contained in the *Book of Discipline*
 - e) Policies not in writing, but as understood by:
 - Pastor
 - Staff
 - Administrative Board/Council
 - Board of Trustees
 - Staff/Pastor Parish Relations Committee

2. **What policies are needed?**
 - a) Where there is no policy
 - b) Where the policy is inappropriate or outdated
 - c) Where the policy is not clear, especially in specifics and application
 - d) Where the policy does not express the mission and purpose of the church

3. **Areas to be considered in formulating personnel policies**
 - a) Procedure for employment of staff
 - b) Compensation
 - Reviews
 - Overtime for staff
 - c) Support Benefits
 - Insurance: medical, accident, life, workers compensation, long-term disability
 - Pension, retirement fund for staff
 - Social Security
 - Car/Travel expenses
 - Continuing education expenses
 - Annual Conference expenses
 - Housing
 - Professional dues and fees

4. **Work Schedule**
 - a) Regular office hours each day or week
 - b) Hours required beyond regular office hours for staff (evenings & weekend meetings)
 - c) Days off
 - d) Holidays
 - e) Vacation
 - f) Compensatory time

5. **Leaves and Absences**
 - a) Illness/Sick leave for staff
 - b) Disability leave for staff
 - c) Maternity/Paternity leave
 - d) Sabbatical/Study leave for staff
 - e) Absence for district, conference, jurisdiction and national church leadership & duties
 - f) Absence for civic duties
 - g) Absence for National Guard or Military Reserve Service
 - h) Absence for personal reasons (e.g. death or sickness in family)

6. **Staff Substitutes**
 - a) Compensation
 - b) Who shall pay?

7. **Supervision and Reports**

8. **Evaluation**

9. **Grievances**

10. **Retirement**
Is there a time when a staff person shall retire? The *Discipline* defines this for a pastor.

11. **Procedure for Termination of Employment**
Does the pastor have the authority to terminate staff persons, or does such action require action of the staff/pastor parish relations committee and/or administrative board/council?

12. **Policy Review and Revisions**

All established personnel policies should be reviewed annually by the staff/pastor parish relations committee, including consideration of any recommendations submitted by the employed or appointed staff. The committee should assume major responsibility for review and revision of the policies to make certain the policies are up-to-date and operative.

Questions To Be Considered In Formulating Each Area Or Policy

1. What has this church done in the past and what has been the result?
2. What is required by the Annual Conference in support of specific categories of persons in ministry?
3. What do the professional associations recommend?
4. What do other churches do?
5. What do the Annual and General Conferences recommend?
6. What do business, industry, and schools in the surrounding areas do?
7. What does the law require: local, state, federal, IRS?
8. What is fair and just?
9. What is unique about our church?
10. What is the effective date of the policy?
11. Is there to be a "grandfather clause" in the policy?

Note: Most of the above information comes from a leaflet provided by the Section of Deacons & Diaconal Ministries, General Board of Higher Education and Ministry, The United Methodist Church, P. O. Box 340007, Nashville, TN 37203-0007

SAMPLE . . . JOB DESCRIPTION - OFFICE SECRETARY

Expectations: This person shall ...

1. Not be a member of this church.
2. Have a minimum of 3 years of secretarial experience.
3. Have positive relational skills.
4. Be able to type 50 wpm.
5. Be familiar with word processing.
6. Be familiar with filing.

Hours: 8:30 AM until 5:00 PM, Monday through Friday, lunch hour between 12:00 and 1:00.

Vacation, Holidays, Sick Days, Personal Days: These are defined in the church's Personnel Policies.

Line of Accountability:

The office secretary is accountable to the pastor. In the pastor's absence, he/she is responsible to the person designated by the pastor.

Duties:

1. Keep church matters confidential: i.e. counseling appointments, information, staff situations
2. Meet with the pastor each morning to go over the daily calendar. The pastor will inform the secretary of his/her schedule during the day, in case he/she is needed for an emergency.
3. Type correspondence and other materials for the pastor. At times, type correspondence for other staff members.
4. Maintain the filing system
5. Open the church mail each day, giving to the pastor and staff members their respective mail. If there is a question about who should receive mail, give it to the pastor.

6. Answer the telephone with "Good morning/afternoon. [First] United Methodist Church." If the call is for the pastor or a staff person, route it. If the pastor(s) or staff person is in a meeting, has someone in his/her office, or is away from the church, ask the person if he/she would like to leave a number and have the call returned as soon as possible.
7. Keep the pastor informed about all that you believe he/she should know concerning the church.
8. Keep the pastor informed about hospitalized persons.
9. Attend the weekly staff meeting and take minutes. Bring the calendar to the meeting and share information the pastor and staff should have.
10. Keep the membership roll in order. Write for membership transfers; acknowledge transfer requests. Keep a separate annual list (January 1 - December 31) for all membership changes and baptisms.
11. Monday of each week begin to prepare and mail the weekly newsletter. Mail/Email it on Tuesday.
12. Thursday of each week, prepare the worship bulletin for Sunday.
13. Maintain the flower chart.
14. Fulfill other duties as requested by the pastor.

ADDITIONAL RESOURCES

A number of resources are available to assist both laity and clergy in pastoral transitions. Pastoral moves are much more complicated than in years past. Some churches plan an overnight retreat with pastor, staff and church leaders in preparation for a move. An outside resource person can be very helpful in such an event. The more we understand the dynamics of pastoral transitions, the better our ministry will become.